

Calendar Year 2011 Louisiana TravelsAmerica Visitor Profile Report



Calendar Year 2011 Louisiana
TravelsAmerica Visitor Profile Report

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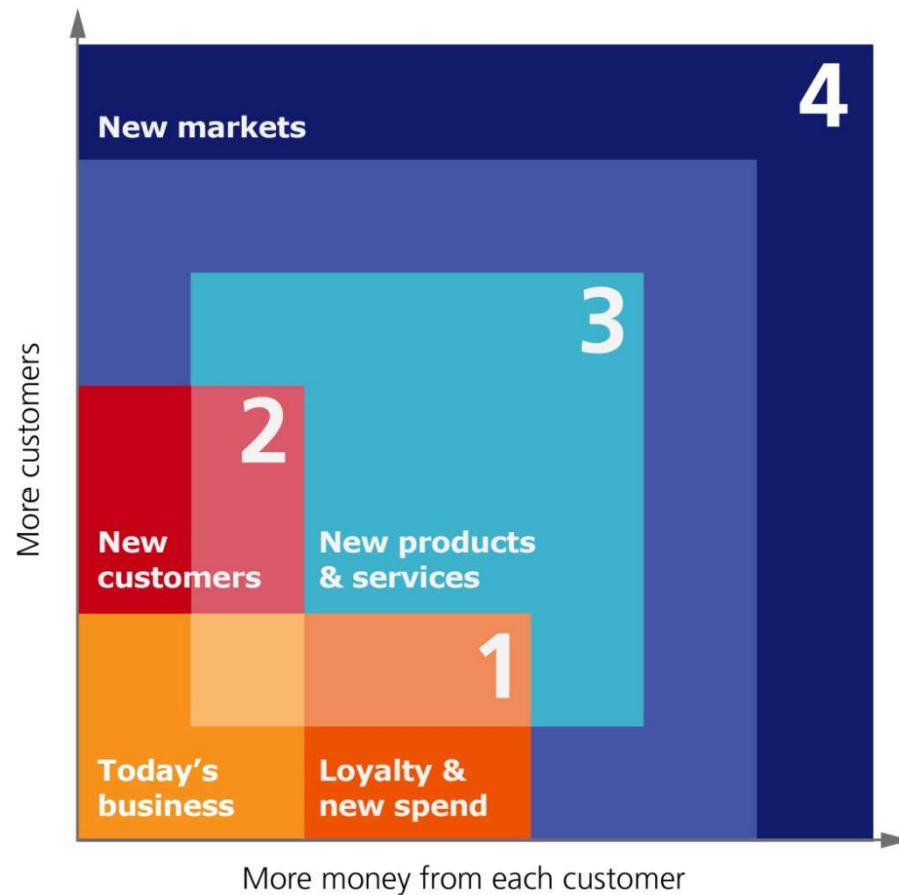
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Growth summary



- **The Louisiana Office of Tourism has two primary goals:**
 - To attract more visitors to the state
 - Encourage longer stays, greater spending, and more frequent visits among those who do choose to visit Louisiana.

Growth summary



Growth insights

- In-state and nearby states represent the most viable markets for Louisiana, as the visitors from these areas represent a disproportionate share of visitors.
- Since African-Americans visitors tend to be younger and represent a large concentration of residents in the target Southern states, finding ways to appeal to this group can boost their already strong visitation levels to Louisiana.
- Louisiana has many activities and features that can appeal to different tastes, so messaging can target interests by market.
- As a large and growing population segment, those in the mature market remain a key to increasing out-of-state tourism with their greater affluence, retirement (have time to visit), and above average spending levels in Louisiana.

Precise plans for growth

- Concentrate on the leading markets where most visitors live and are within driving distance: Texas, Mississippi, Georgia, and Florida. Profile residents in larger source cities (Houston, Dallas, Atlanta) and target with tailored digital campaigns.
- Stress activities that appeal to everyone, such as *shopping, fine dining, gaming, and sightseeing*. Use *nightclubs/dancing* to appeal to African-Americans and hip urban areas such as New York residents.
- Continue to embrace older visitors by emphasizing the activities that most appeal to them: *gaming, fine dining, and shopping*.
- Promote multi-city vacations such as packages across cities (blend historic New Orleans with the capitol of Baton Rouge; encourage gamers to see more of the state by visiting both Lake Charles and Shreveport).



Introduction and Purposes of the Research

TNS is pleased to present this TravelsAmerica report for the Louisiana Office of Tourism. TNS conducts this online (data collection) project continuously throughout the year as a nationwide syndication. The results enable the assessment of visitor volumes and development of profiles of leisure visitors to the state.

As a tracking study, TNS and the Louisiana Office of Tourism constantly strive to improve the research. This report assesses the total volume of visitors to Louisiana plus those arriving from three key areas. The profile of Louisiana's visitors encompasses:

- Volume and source of visitors
- Basic demographics such as age, presence of children in household, household income
- Trip characteristics such as day vs. overnight, business travel, travel expenditures, length of stay, activities selected, travel timing (quarter), mode of transportation
- Visitor residence by state and DMA
- Satisfaction with Louisiana as a destination
- An Export/Import assessment of spending by Louisiana residents traveling elsewhere vs. non-Louisiana residents visiting Louisiana
- Competitive destination comparisons to Louisiana



Introduction and Purposes of the Research *continued*

- Specific segments of visitors:
 - In-state residents
 - High BDI Marketing Area (Above average number of visitors from DMA; see appendix)
 - Residents living elsewhere (neither in-state nor in the High BDI Marketing Area)
 - African-Americans
 - Hispanics
 - Mature visitors (defined as those 55+).
- Six regional profiles:
 - Alexandria
 - Baton Rouge
 - Lafayette
 - Lake Charles
 - New Orleans
 - Shreveport.
- Seven markets (very small samples):
 - Dallas
 - Houston
 - Atlanta
 - Memphis
 - Chicago
 - Los Angeles
 - New York City.

The report continues with the Executive Summary followed by the Results of the Research section, which includes detailed tables and graphics of findings. The appendix contains a description of the Business Development Index by DMA, the research methods, and a glossary of terms.



One page overview

Abstract

Derived from the TNS TravelsAmerica syndication, highlights from this fifth annual report prepared for Louisiana Office of Tourism for Calendar Year 2011 (January 1 through December 31, 2011) include:

- Louisiana visitation grows in 2011 after stabilizing in 2010. Post-Katrina, post-Gulf Oil Spill, post-recession Louisiana has the potential for revitalized tourism and could market itself as a “new” destination.
- Louisiana successfully draws tourists from in-state and nearby areas (High BDI Marketing Area), but can target the more distant market again as it recovers (24% in 2011).
- For information, Louisiana visitors still most heavily rely on past experience, word of mouth (friends/relatives), and various Internet sources. Although using online booking methods more often than offline purchases (43% vs. 35%), they lag Total US travelers online (43% vs. 48%).
- Because visitors often arrive from in-state or from the High BDI marketing area, most drive (77%). That said, some areas, most notably New Orleans, draw visitors from farther away, who in turn, tend to stay longer and spend more. Those distant visitors are harder to attract, but worth more once they come.
- Special markets (African-Americans, Mature Travelers, Hispanics) each have unique travel patterns, preferences, and desires that Louisiana can fulfil and promote – gaming, nightclubs, fine dining, historical sites, and shopping are just some of the features where Louisiana fits well with these groups.
- Each destination within Louisiana has attributes that attract visitors – New Orleans perhaps has the greatest variety, but Shreveport and Lake Charles attract *gaming* tourism, especially among retirees, while several areas get credit for good *shopping*. They each have strengths to lure potential tourists.
- From another point of view, the different source markets find different aspects of Louisiana appealing, which can help to guide future promotions. For example, *fine dining* and *urban sightseeing* appeal to most, New Yorkers feel more affinity for *nightclubs* and *museums*, Houston visitors show more interest in *gaming*.
- The tourism export/import “balance of trade” assessment becomes even more positive in 20101 as Louisiana lures more residents from outside the state (exports); however, encouraging domestic spending remains important as well.

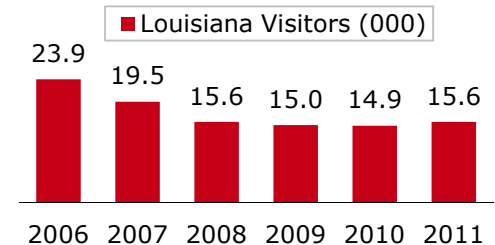


Executive Summary/Implications

Importance of tourism to Louisiana

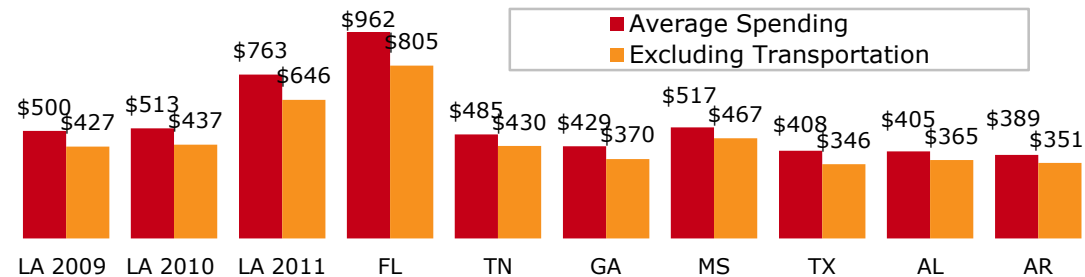
Several measures underscore the importance of tourism to LA:

- **Volume of Visitors.** Although the TNS visitor volume differs from volume numbers shown by some of Louisiana's other resources, it is important to note that in 2011, visitation begins to rise after stabilizing in 2010. In addition, Louisiana continues to outpace two key competitors: Arkansas and Mississippi.

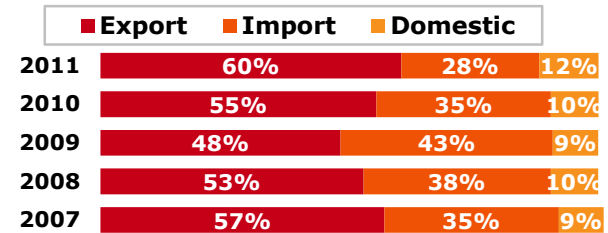


- **Overnight Volume.** The increase in volume does not dilute its strength in overnight visitation. Overnight stays remain strong (69%) and similar to total US travelers (68%). The average length of stay continues to hover near three nights (3.1 in 2011), similar to most competitors except Florida (4.6 nights). Further, over half (52%) continue to stay in paid accommodations (hotel/motel/ B&B/condo), exceeding all primary competitors (28% to 46%).

- **Travel Spending in Louisiana.** Louisiana visitor spending grows substantially in 2011 and surpasses all competitive states with the exception of Florida.



- **Balance of Trade.** The increased volume and spending levels for Louisiana enable it to increase its "surplus" in 2011. Exports (travel dollars coming into Louisiana from non-residents) widens its gap over imports (Louisiana residents who spend travel dollars outside Louisiana). In addition, many domestic travel dollars remain in the state (Louisiana residents traveling locally).

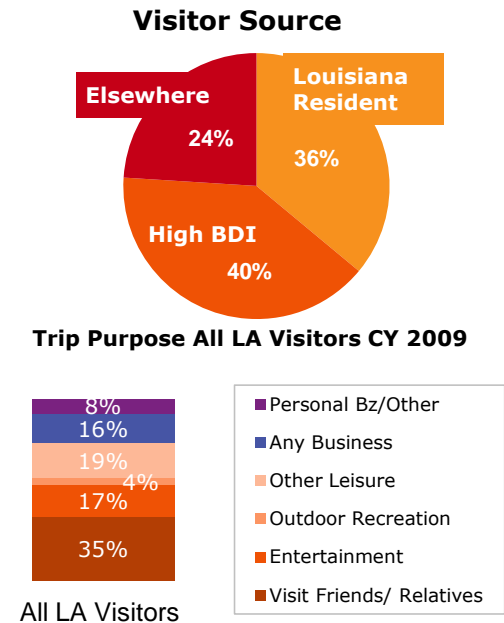


Executive Summary/Implications

Importance of tourism to Louisiana *continued*

Several measures underscore the importance of tourism to Louisiana - *continued*:

- **Source of Visitors.** Louisiana builds strong tourism with nearly two-thirds of Louisiana's visitors living outside the state (40% from the 35 High BDI Marketing Area states and 24% from more distant markets).
- **Trip Purpose.** Leisure travel (76%) continues to be the greatest motivation for visitors compared to business (16%) or other travel reasons (8%). Visiting friends/relatives (35%) dominates leisure travel, followed by entertainment (17%).
- **Timing.** Visitation to Louisiana peaks in the Spring, unlike national travel which peaks in Summer. Those traveling from the High BDI visit similarly in the spring and fall, proving Louisiana's ability to promote the shoulder season to those potential visitors. Winter attracts those from further away (non-Louisiana, non-High-BDI Marketing Area).
- **Business Travel.** Business travel behaviors/choices differ from leisure travelers. While they represent fewer trips (16% vs. 76% strictly leisure), they more often fly (19% vs. 9%), stay longer (4.2 vs. 3.0 nights), pay (hotel/motel) for lodging (3.0 vs. 1.3 nights), and are more likely to travel alone (67% vs. 19%).



Executive Summary/Implications

Profile: Trip and travel characteristics

- **Demographics.** Louisiana visitors generally mirror last year and Total US Travelers, with some variations. Differences also appear by residence with in-state Louisiana visitors often lagging the Total Louisiana visitor.

Visitor Characteristics (Louisiana CY 2011; Louisiana CY 2010; Louisiana CY 2009; Total US CY 2011; Total US CY 2010)

No/Very Little Difference

Age	(45; 47; 46; 47; 47)
Married	(56%; 59%; 61%; 61%; 60%)
With Kids	(34%; 32%; 32%; 33%; 33%)
Future Shaper/Maker	(36%; 33%; 33%; 32%; 31%)
Retirees	(16%; 17%; 17%; 18%; 16%)

Minor Differences

Income	(\$69K; \$67K; \$65K; \$75K; \$74K)
College Grad	(41%; 45%; 38%; 47%; 47%)
African-American	(14%; 16%; 17%; 6%; 6%)

Larger Variances: None

Characteristics That Vary by Residence (In-State; Total Louisiana Visitor)

Younger	(44; 45)
Less Affluent Income	(\$53K; \$69K)
More Married	(58%; 56%)
More with Children	(37%; 34%)
Fewer College Grads	(32%; 41%)



Executive Summary/Implications

Profile: Trip and travel characteristics *continued*

- **Travel Planning Horizons Remain Short, But Vary by Distance.** Many (43%) Louisiana visitors decide to take the trip relatively spontaneously (within two weeks of departure), but the spontaneity declines with increasing distance (and travel time): in-state (62%), High BDI Marketing Area (43%), elsewhere (25%). Hispanic visitors (14%) are much less likely to make a last minute decision.
- **Travelers Primarily Rely on “Experience” for Information.** Similar to other travelers, Louisiana visitors rely most heavily on past experience (28%) and word of mouth (20%) for information to plan a trip. While the Internet is a popular place to gather information (24%), just one traveler in 10 (10%) currently uses destination websites. Printed information has even less reach and impact (3% destination printed material, 1% each for magazines and newspapers).
- **Fewer Louisiana Visitors Book “Online” Than Others.** Although more Louisiana visitors book online than offline, they book online less often than other travelers (43% vs. 48% Total US) and offline at about the same rate as others (35% vs. 36% offline).
- **Most Visitors Drive.** About three-quarters of visitors drive to their destinations (77% to Louisiana vs. 76% Total US). The proportion, as expected, declines with distance: residents (92%), High BDI Marketing Area (81%), and elsewhere (49%).
- **Overnighters Spend More.** Not surprisingly, because of the additional time spent on the trip and because they incur lodging expenses (averaging 3.1 nights), overnight visitors spend almost four times as much as day trip visitors (\$863 vs. \$229).



Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments

Given differing travel habits and motivations, marketing messages can be tailored to increase relevance for key target groups. Three separate markets covered by this report include (comparisons shown below are the segment vs. all Louisiana visitors):

- **African-American Visitors:**

- **Demographics:** This group comprises one seventh (14%) of all Louisiana visitors. In many ways, they trail other visitors – younger (39 vs. 45), less affluent (\$53,400 vs. \$68,900), half as likely to be married (27% vs. 56%, which contributes to lower reported household incomes), more often (34% vs. 22%) live alone, and are slightly less likely to have full-time employment (58% vs. 64%). Although their employment level stabilizes after dropping in 2010 (59% from 58% last year and 68% in 2009), this young segment still appears to feel the impact of the economy.
- **Travel Patterns:** More of this segment travels to Louisiana to visit friends and relatives (42% vs. 35%), thus representing a less profitable niche. While just as likely to stay overnight as other Louisiana visitors (69% vs. 69%), they do not stay quite as long (2.8 vs. 3.1 nights) and they more often opt to stay with friends or relatives (46% vs. 35%). However, they claim to spend an above average amount (\$950 vs. \$763).
- **Activity Choices:** African-Americans choose *nightclubs/dancing* much more often than Total Louisiana visitors (14% vs. 9%, consistent with their age) and, consistent with their trip purpose and lodging choices, more *visit relatives* (29% vs. 24%) or *friends* (25% vs. 17%).



Executive Summary/Implications

Diverse characteristics appear in ethnic/age segments *continued*

▪ **Hispanic Visitors:**

- **Demographics:** The smallest of the key segments (2% of Louisiana visitors) and, consequently (caution to reader), reflect a small sample size (n=20). This group is somewhat younger (39 vs. 45) and earns less (\$59,500 vs. \$68,900), probably impacted by fewer dual-incomes since fewer are married (44% vs. 56%). Consistently, fewer of them live with children (29% vs. 34%).
- **Travel Patterns:** None claim to travel on business and usually visit for pleasure (88% vs. 76%) or personal business/other (12% vs. 8%). They represent a potentially profitable niche as they more likely stay overnight (78% vs. 69%), but need encouragement since they do not stay quite as long (2.6 vs. 3.1 nights) and not as hotel guests (35% vs. 52%). They spend less than average (\$514 vs. \$763).
- **Activity Choices:** They seem to be intrigued by history and animals; they more likely visit *historic sites/churches* (38% vs. 13%), *museums* (32% vs. 7%), *old homes/mansions* (17% vs. 7%), and *zoos* (15% vs. 4%) than other Louisiana visitors.

▪ **Mature Visitors:**

- **Demographics:** Representing a third (31%) of Louisiana visitors, this group, by definition, is older (64 vs. 45). Somewhat more affluent (\$78,400 vs. \$68,900), more of them claim to be Caucasian (92% vs. 81%). Consistent with their age, they represent more retirees (47% vs. 16%).
- **Travel Patterns:** This group often spends the night (65% vs. 69%) and for an average length of time (3.0 vs. 3.1 nights), with about somewhat more than half paying for lodging (57% vs. 52%). They spend more overall (\$1,002 vs. \$763), especially on gaming \$202 vs. \$79).
- **Activity Choices:** More often gamble (21% vs. 15%).



Executive Summary/Implications

Diverse characteristics appear by destination

Destinations may want to tailor their marketing messages to those they attract, as noted for these six Louisiana areas (top areas noted in brown):

Age

Alexandria	44
Baton Rouge	40
Lafayette	45
Lake Charles	47
New Orleans	41
Shreveport	44

Income

Alexandria	\$66,700
Baton Rouge	\$49,900
Lafayette	\$77,800
Lake Charles	\$61,800
New Orleans	\$77,700
Shreveport	\$55,700

Employed Full-Time

Alexandria	64%
Baton Rouge	59
Lafayette	84
Lake Charles	59
New Orleans	66
Shreveport	59

Retired

Alexandria	10%
Baton Rouge	10
Lafayette	13
Lake Charles	16
New Orleans	9
Shreveport	19

Married

Alexandria	61%
Baton Rouge	45
Lafayette	68
Lake Charles	51
New Orleans	50
Shreveport	56

% With Children

Alexandria	45%
Baton Rouge	38
Lafayette	54
Lake Charles	26
New Orleans	31
Shreveport	33

% African-American

Alexandria	21%
Baton Rouge	29
Lafayette	11
Lake Charles	18
New Orleans	20
Shreveport	13

% Louisiana Resident

Alexandria	53%
Baton Rouge	51
Lafayette	43
Lake Charles	28
New Orleans	23
Shreveport	27



Executive Summary/Implications

Travel choices also vary by destination

Destinations can align their marketing messages to fit with the travel patterns of their visitors (top areas noted in brown):

% VFR*

Alexandria	40%
Baton Rouge	46
Lafayette	46
Lake Charles	29
New Orleans	26
Shreveport	20

% O/N** and # Nights

Alexandria	72%	4.7
Baton Rouge	73	3.0
Lafayette	69	4.3
Lake Charles	71	2.5
New Orleans	81	3.5
Shreveport	66	2.8

% Travel in Pairs

Alexandria	19%
Baton Rouge	31
Lafayette	20
Lake Charles	38
New Orleans	33
Shreveport	40

% Drive Own Auto

Alexandria	88%
Baton Rouge	81
Lafayette	94
Lake Charles	92
New Orleans	61
Shreveport	91

Top Two Activities

Alexandria	Visit relatives 30%; Visit friends 14%
Baton Rouge	Visit relatives 31%; Shop 21%
Lafayette	Visit relatives 34%; Shop 31%
Lake Charles	Casino/Gaming 44%; Visit relatives 22%
New Orleans	Urban sightsee 33%; Shop/Dine tie 32%
Shreveport	Casino/Gaming 32%; Visit Relatives 18%

Spending in LA

Alexandria	\$477
Baton Rouge	\$440
Lafayette	\$431
Lake Charles	\$848
New Orleans	\$1210
Shreveport	\$743

Satisfied*** with LA

Alexandria	88%
Baton Rouge	88
Lafayette	82
Lake Charles	93
New Orleans	91
Shreveport	77

*VFR: Visit Friends/Relatives (Primary Purpose)
 ** O/N: Overnight
 *** Extremely/Very Satisfied



Executive Summary/Implications

Competition fiercest in, but not limited to, the South

- **Southerners Stay in the South, but Are Willing to Travel Beyond.** Not surprisingly, particularly in the current market, proximity continues to play a substantial role in destination choices. The top six destinations chosen by Louisiana visitors are all southern states (TX, FL, MS, AL, GA, TN); however, California, New York, Colorado, Oklahoma, and Pennsylvania also make the top twelve.
- **Top cities (DMAs) visited reflect a similar pattern.** New Orleans leads as the top city visited in the past three years by Louisiana visitors, followed by other Southern areas: Dallas/Ft. Worth, Houston, Orlando, and San Antonio. New York City, the top non-Southern DMA, ranks sixth.

Louisiana generates high levels of satisfaction

- **Across Geography and Segment, at least 8 in 10 are Satisfied with Louisiana.** Louisiana visitors rate the state highly, with those living in-state (90% extremely/ very satisfied) assigning higher “marks” than those in the High BDI Marketing Area (86%) or other visitors (85%). Among the cities visited, Shreveport lags the other five (77%).



Executive Summary/Implications

Assessment

- **Louisiana Catches the Recovery That Began in 2010 for the US.** US travel began to climb in 2010 and Louisiana begins to grow in 2011. Louisiana attracts general US residents (aided by New Orleans) – beyond in-state and nearby (High BDI Marketing Area) residents. This creates an opportunity to openly market the state as a post-Katrina, post-Gulf Oil Spill, post-recession, fun place to visit.
- **Word of Mouth and Past Experience are Key to Future Growth.** Recommendations from friends and family, along with past experience, remain the most important sources of information about destinations, and can be difficult to leverage. Louisiana already enjoys strong satisfaction among visitors and improves on that this wave. Further, use of social media tools could help Louisiana “spread the word” among family and friends.
- **Local Visitors and Specialty Markets Are Important, But Long-Distance Travelers Boost Tourism Revenue.** A quarter of Louisiana visitors (24%) come from outside the state and the High BDI marketing area. These people stay longer, pay for lodging, take advantage of more “tourist” activities, and as a result spend considerably more (\$1,381 vs. \$763) than the average visitor. New Orleans is the most successful area in attracting these visitors – perhaps other areas could entice those tourists to stay an extra day or two to explore their unique features as well.
- **Match Promotions to Activity Preferences in Key Source Markets.** Residents of bigger, but distant cities seek urban activities and often focus on *fine dining* and *urban sightseeing*. Although samples are small, some markets reveal different interests, such as *nightclubs* and *museums* for New Yorkers and *gaming* for those from Houston.



1

Results of the Research



2

Visitor Volume and Origins

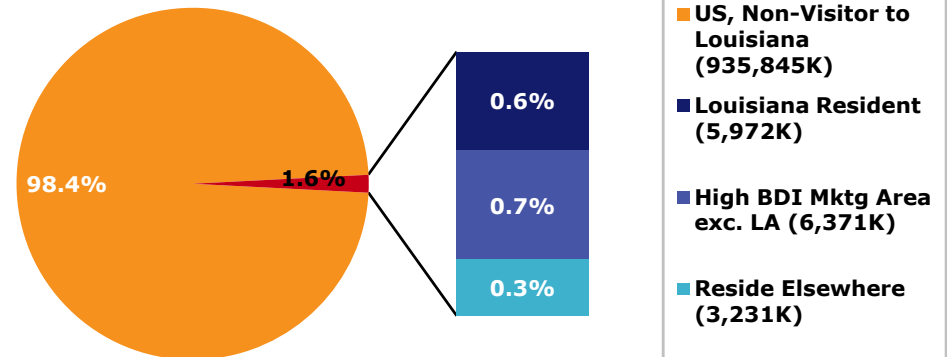


Overall volume of visitors to Louisiana

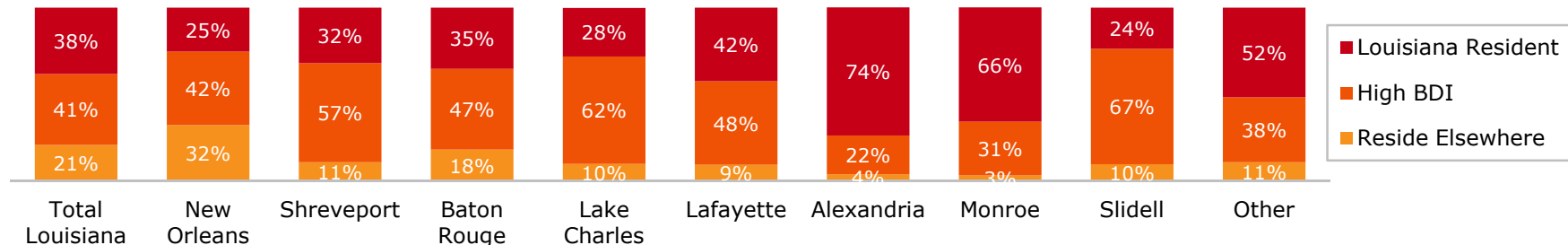
Market overview (person-trips): 2011 grows from 2010

- CY 2011 person-trips visits to Louisiana (15,574,000) grew at about the same pace (+4%) as the Total US (15,574,000 from 14,936,000 for Louisiana and 951,419,000 from 913,318,000 for the Total US).
- Louisiana continues to draw more visitors from those most familiar with it – in-state residents and the High BDI Marketing Area
- New Orleans remains the most popular city and draws more visitors from the rest of the country (32%) than other Louisiana cities; further, its proportion of Louisiana visitation continues to rise (37% from 34% in 2010 and 31% in 2009).

Projected Visitation – All US Trips (951,419,000)



Louisiana Cities Visited by Residence (% of All Louisiana Visitors; Multiple Cities Allowed)



100%	37%	15%	14%	9%	10%	5%	7%	3%	22%	CY 2011
100%	34%	17%	15%	9%	13%	5%	4%	5%	21%	CY 2010
100%	31%	17%	18%	7%	9%	5%	4%	3%	25%	CY 2009

% of Total Louisiana Visitors (Person-Trips) Who Visit Each City

Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)
 Q4d. Please indicate the cities and/or places visited (Person Trips) (day or overnight trip)



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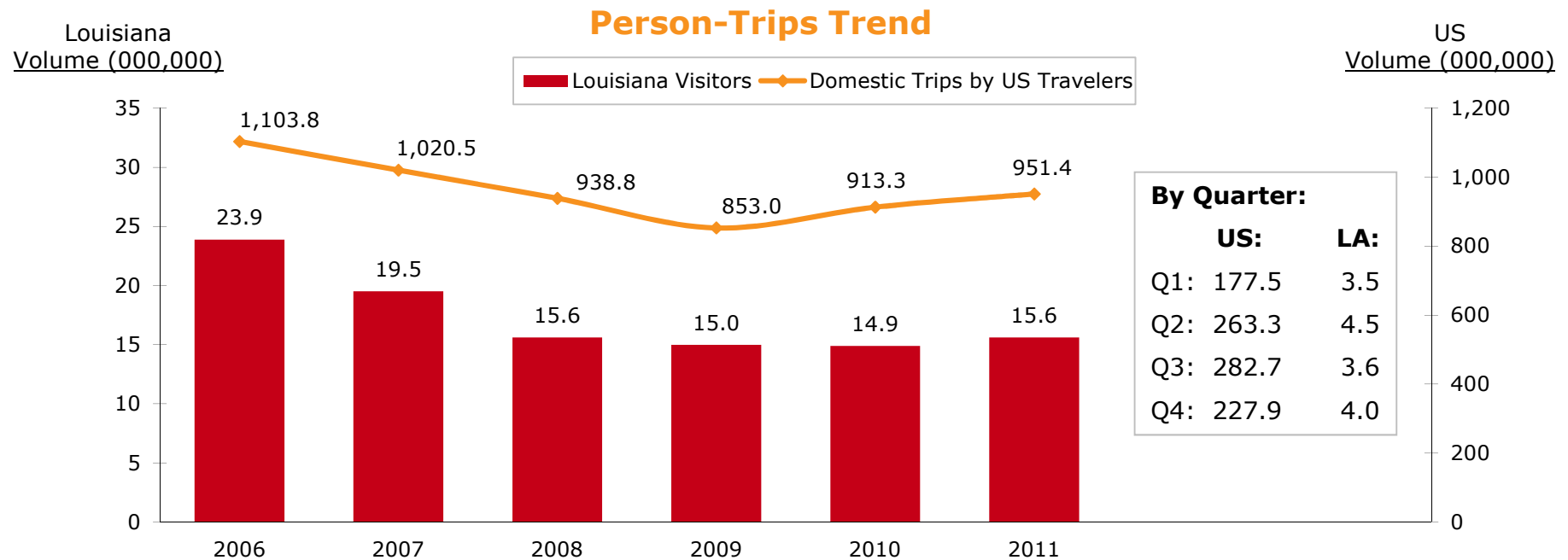
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Louisiana volume climbs with the US in 2011

- US travelers' domestic trips reversed its steady decline in 2010 and improves again in 2011
- Louisiana visitation climbs as well
- Unlike US travel, with most trips occurring in Q3 (July-September), Louisiana draws a larger share of visitors in the shoulder seasons (April - June; October - December).



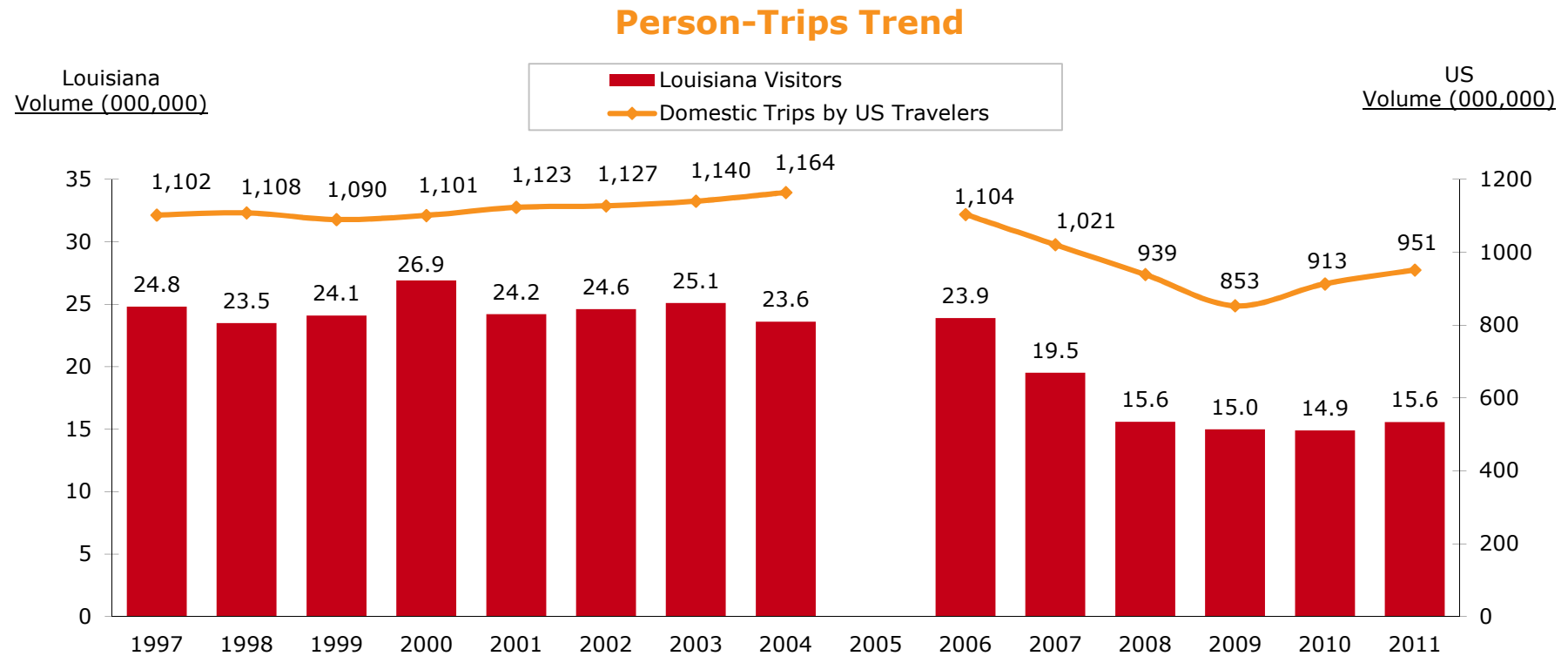
Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)



Louisiana's historical visitor volume

Longer trends

- The decline in visitation to Louisiana stabilized in 2010 and improves in 2011.



Source: 1998 – 2004 = TIA
Q4a. Please indicate the US state(s) visited (Person Trips) (day or overnight trip)



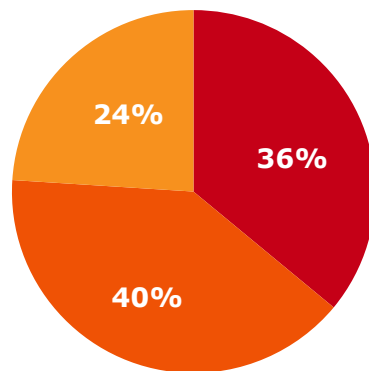
Relative size of key segments

Market relevance

- Out of 203 DMA areas outside of Louisiana, the state hosts an above average number of visitors from 35 of them (Louisiana's High BDI Marketing Area, shown later)
- Similar to the past, more visitors live in-state (36%) or in the High BDI Marketing area (40%) than elsewhere
- The bulk of Louisiana visitors (39%) place in the 35-54 age category
- Although Louisiana hosts more than double the US average of African-Americans (14% vs. 6%), the vast majority of visitors are still Caucasian (81%).

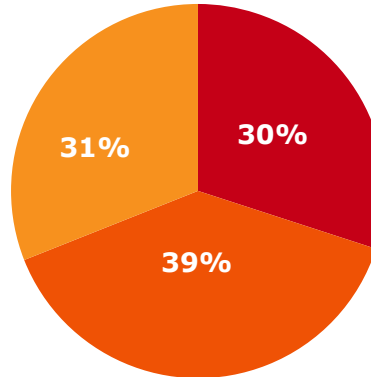
Proportion of Louisiana Visitors by Segment

By Source



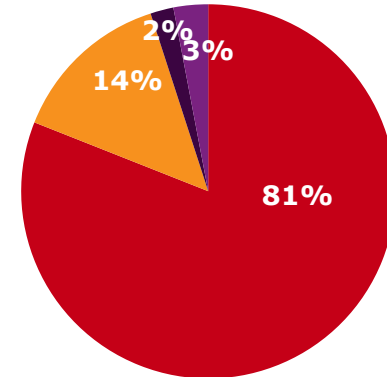
■ Louisiana ■ High BDI ■ Elsewhere

By Age (Mature = 55+)



■ Under 35 ■ 35 - 54 ■ 55+

By Ethnicity



■ White ■ AA* ■ Hispanic ■ Other

* African-American

QD: How old are you? Panel: Residence and ethnicity (Household Level)

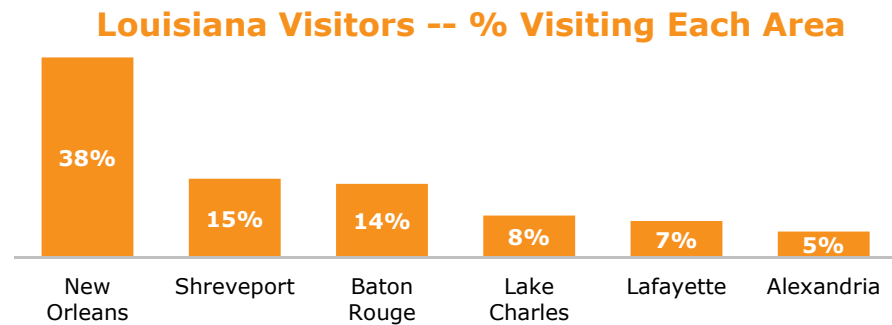
Caution: Note Small Sample (20) for Hispanics yields less reliable comparisons



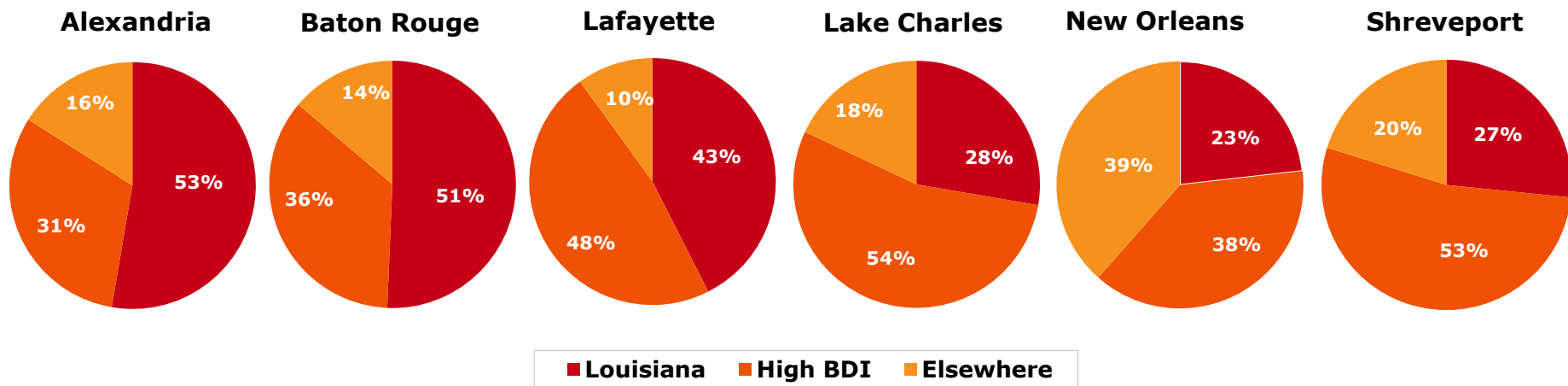
Source of visitors by Louisiana destinations

Market relevance

- More than a third (38%) of Louisiana visitors stop in New Orleans; Shreveport and Baton Rouge battle for second place
- The source of visitors to each area varies widely:
 - Alexandria, Baton Rouge, and Lafayette depend more heavily on locals (LA residents)
 - Lake Charles and Shreveport attract the largest share of High BDI residents
 - New Orleans draws from everywhere and claims the largest share of more distant ("elsewhere") visitors.



Proportion of Louisiana Visitors to Destination by Source



Panel: Residence (Household Level-demo wtd)



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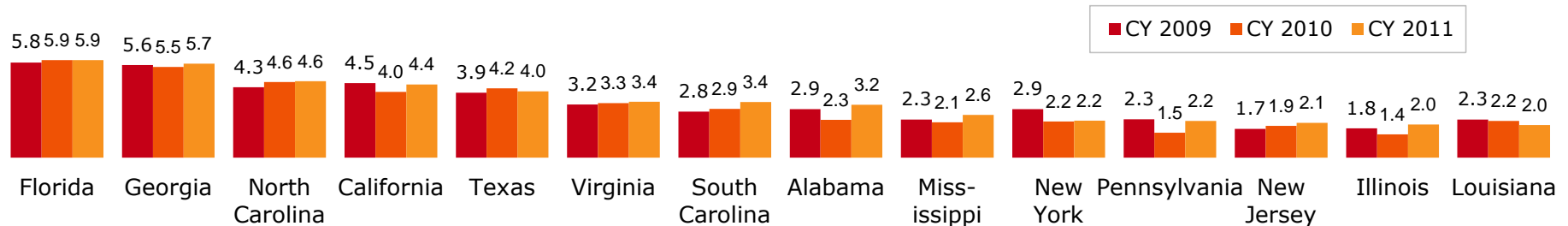
24

African-Americans visitors

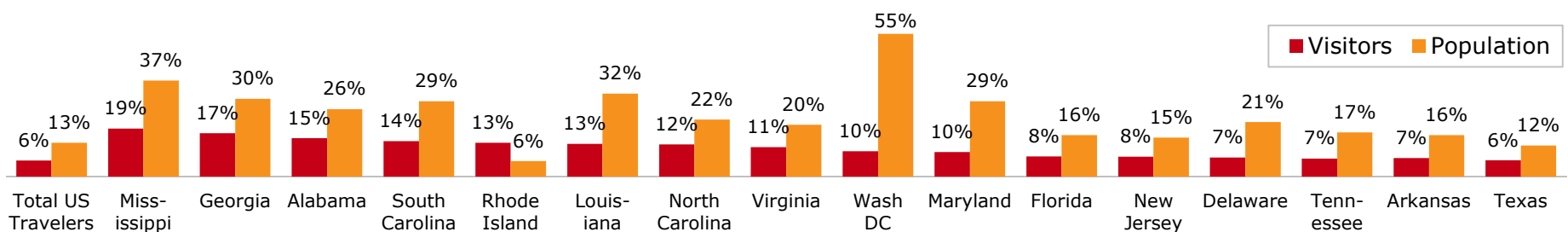
African-Americans travel less to most states

- Florida and Georgia draw the greatest number of African-American visitors
- A few states continually grow the number of African-American visitors – notably Virginia, South Carolina, and New Jersey; only Louisiana posts a steady decline
- In terms of proportion of their total visitors, Mississippi (19%) and Georgia (17%) remain at the top.

States With the Largest Number of African-American Visitors (in millions)



States with the Largest Proportion of African-Americans: Visitors and Population



Panel: Residence and ethnicity (Household Level-projected)



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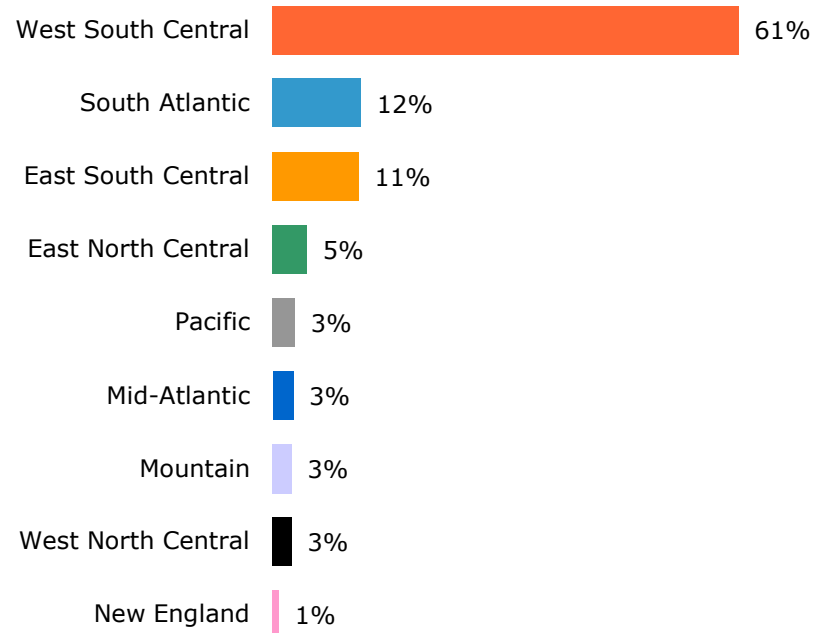
Visitors residence

Most visitors live in-state or in nearby states

- Louisiana continues to source most of its visitors from the West South Central census region, driven primarily by Louisiana (32%) and Texas (26%)
- Mississippi (6%) ranks a distant third among Louisiana's sources.

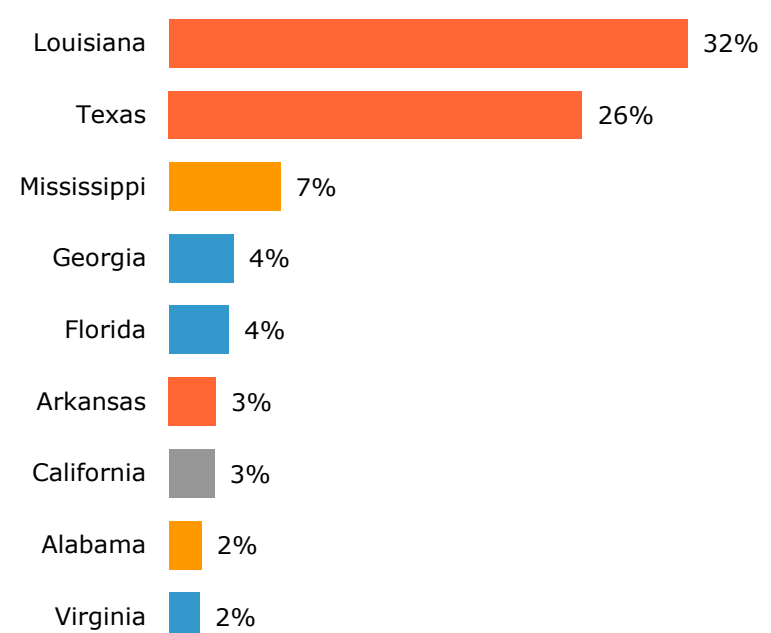
Source of Louisiana Visitors: Census Region

Base: Louisiana Visitors



Source of Louisiana Visitors: Top States

Base: Louisiana Visitors



Panel: State/Region residence of those who visited Louisiana (Household Level-demo wtd)



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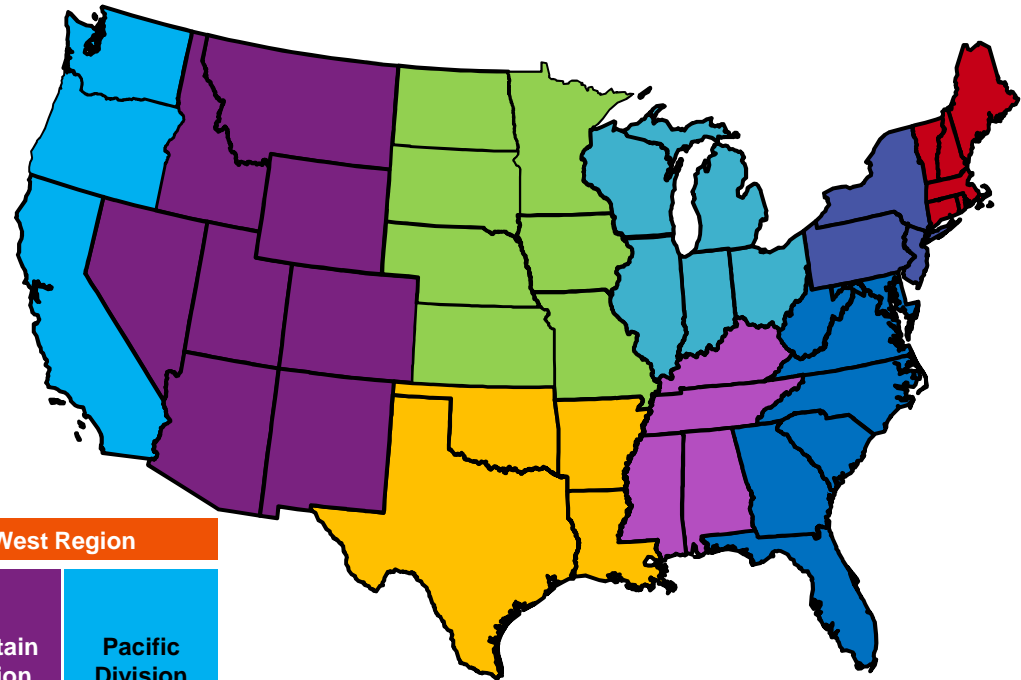
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Geography (Census Region State Composition)

❖ States within regions: use as a reference for prior slide.

Northeast Region		South Region				
New England Division	Mid Atlantic Division	South Atlantic Division	East South Central Division	West South Central Division		
CT	NJ	DL	AL	AR		
ME	NY	DC	KY	LA		
MA	PA	FL	MS	OK		
NH		GA	TN	TX		
RI		MD	North Central Region		West Region	
VT		NC	East North Central Division	West North Central Division	Mountain Division	Pacific Division
		SC				
		VA				
		WV				



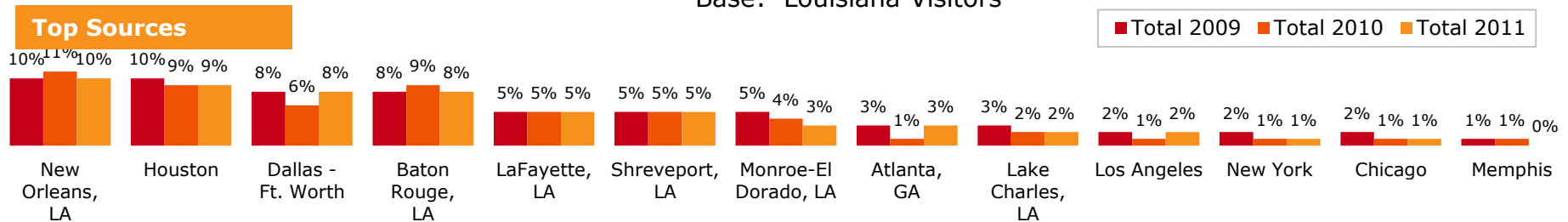
Louisiana visitor residence and trip purpose

Louisiana visitors often live in large, proximal DMAs

- Visitors to Louisiana most often live in New Orleans, Houston, Dallas/Ft. Worth, or Baton Rouge
- Chicago, Baton Rouge, Monroe-El Dorado, Los Angeles, and Atlanta visitors more often travel to Louisiana on business than those from other DMAs.

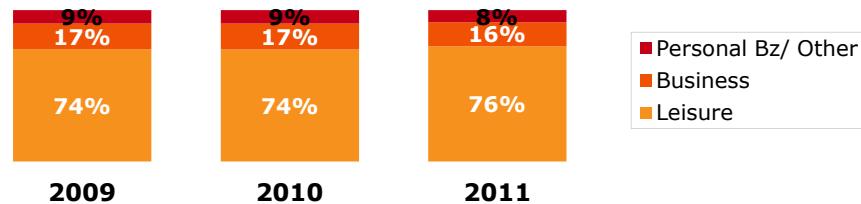
Top Sources of Louisiana Visitors by DMA (4%+ or Focus)

Base: Louisiana Visitors

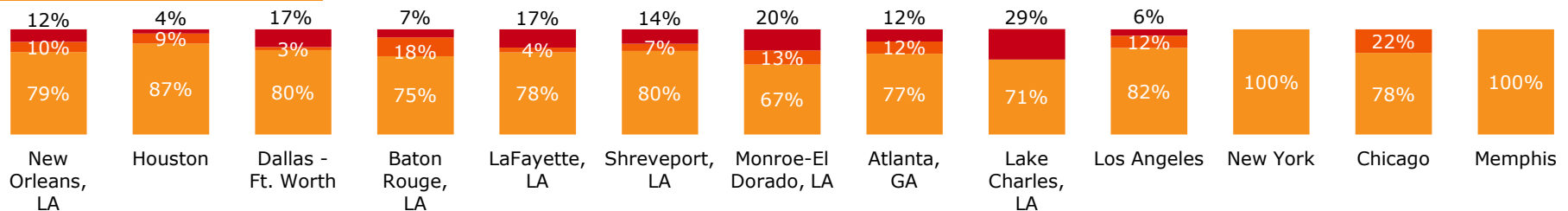


Purpose of Trip

Base: Louisiana Visitors



Source By Purpose



Q1b: Which of the following was the primary purpose for the trip? (Household Level-demo wtd)
Panel: DMA residence of those who visited Louisiana (Household Level-demo wtd)



Louisiana's Business Development Index – Top 15

Louisiana's High BDI Marketing Area

- Louisiana attracts the largest proportion of residents from nearby Mississippi and Texas DMAs
- Overall, 35 DMA areas show above average (index exceeds 100) likelihood to visit Louisiana; the top 15 are shown at right
- The Business Development Index is calculated for each DMA. It measures the propensity of residents to take trips to Louisiana compared to the proportion that DMA constitutes of the total population. For example, Biloxi-Gulfport, MS residents represent 0.109% of all US residents, but 2.184% of total Louisiana visitors. Those proportions $2.184/0.109$ ($\times 100$) yield a BDI index value of 2003
- A list of the 50 highest BDI DMAs for Louisiana are listed in the Appendix at the end of the report.

Louisiana High BDI Index

DMA of Origin	High BDI Index
Biloxi-Gulfport, MS	2003
St. Joseph, MO	1106
Beaumont-Port Arthur, TX	1000
Jackson, MS	780
Tyler-Longview (Lufkin & Nacogdoches), TX	706
Corpus Christi, TX	561
Hattiesburg-Laurel, MS	495
Houston, TX	457
Gainesville, FL	409
Mobile-Pensacola (Ft. Walton Beach), AL-FL	406
Greenwood-Greenville, MS	366
Austin, TX	340
Little Rock-Pine Bluff, AR	305
Wichita Falls & Lawton, TX-OK	289
Tulsa, OK	282

Panel: State/Region residence of those who visited Louisiana (Household Level)



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Visitor Demographics

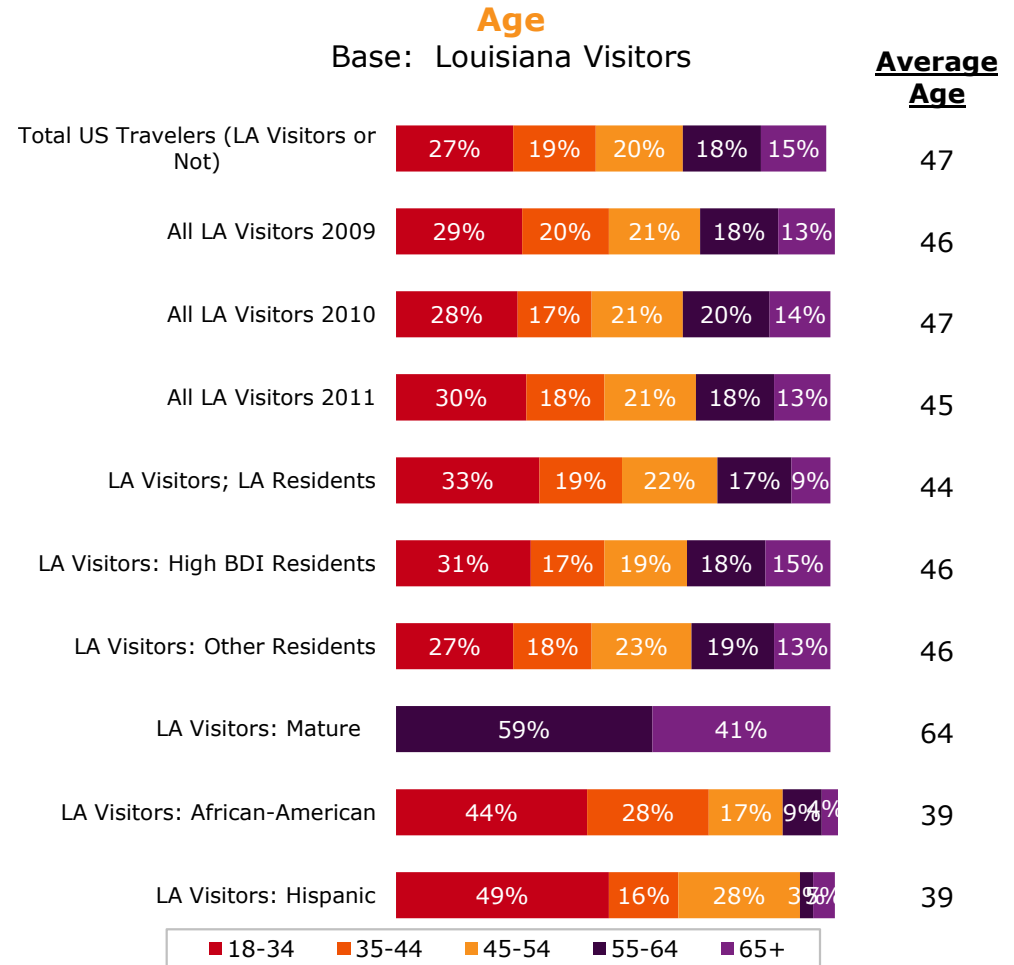


Visitor age

Age varies somewhat by segment

Louisiana visitors claim to be slightly younger than in the past. Further:

- Also mirroring prior years, the youngest visitors continue to be African-American (39) or Hispanic (39)
- Those who live in the state (44) also tend to be younger – also similar to prior waves results
- The Mature market (64) is older, by definition.



QD: How old are you? (Household Level-demo wtd)



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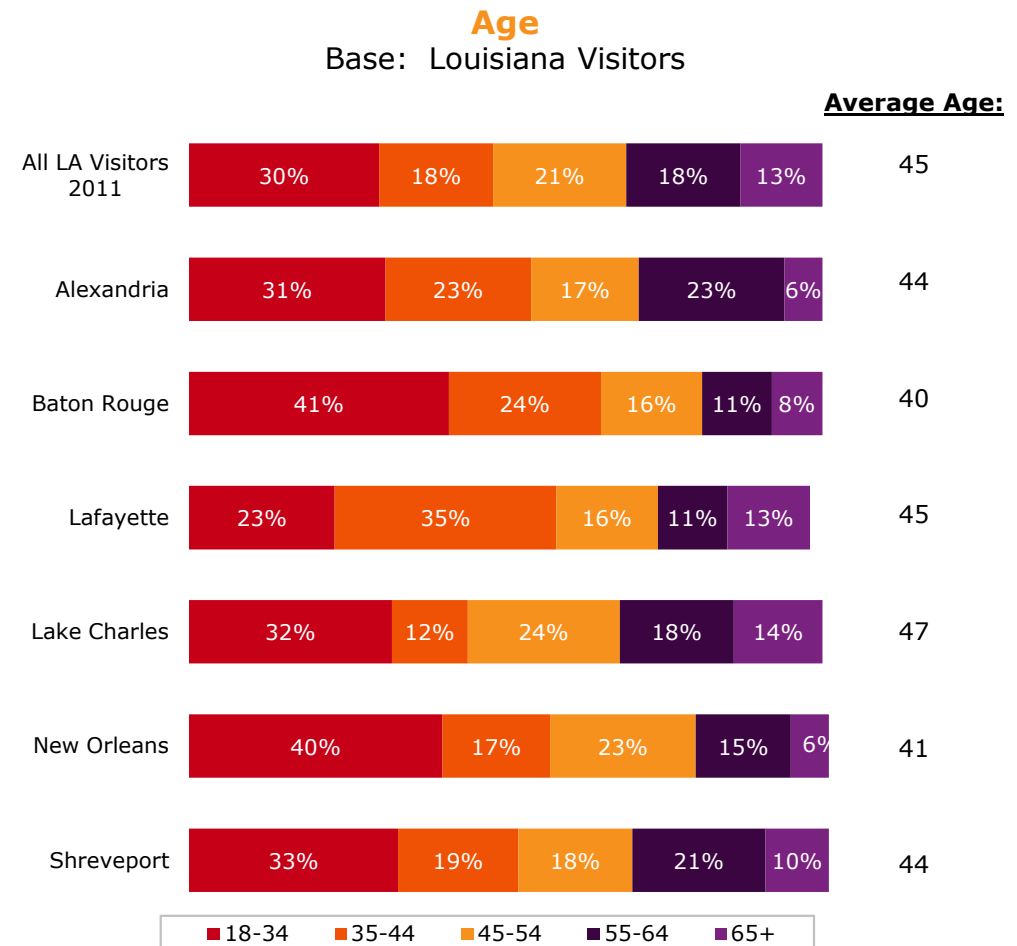
31

Visitor age by destination

Age varies somewhat by destination

While Louisiana visitors generally fall into similar age groups as total US travelers, destinations vary considerably, with notable differences in the activities pursued:

- Lake Charles attracts the oldest visitors, who also note greater participation in *gaming* (shown later)
- Younger visitors choose Baton Rouge and New Orleans, who more often take advantage of *fine dining, urban sightseeing, nightclubs/dancing, old homes/mansions, and museums*.



QD: How old are you? (Household Level-demo wtd)



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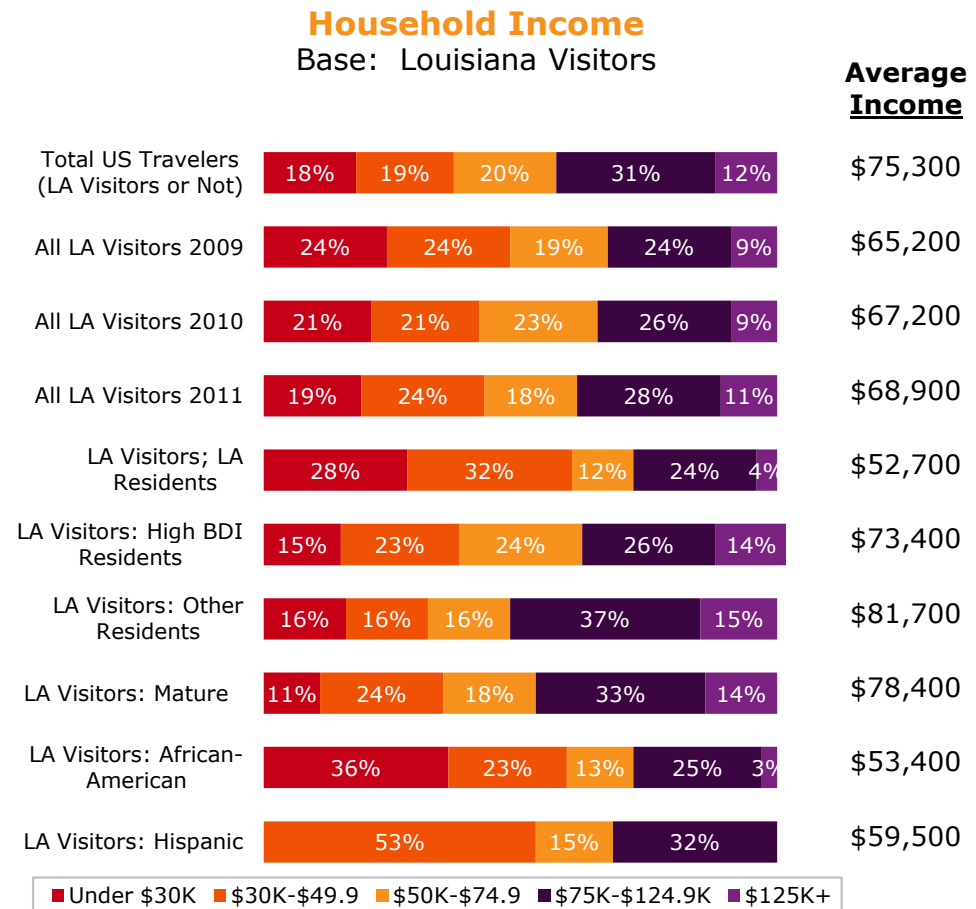
32

Visitor income

Income varies widely by segment, but remains near last year

Louisiana visitors' average income continues to climb, (\$68,900 in 2011), but remains below typical US travelers (\$75,300). In addition:

- Not surprisingly, those traveling the farthest (reside outside of Louisiana and the High BDI Marketing Area) and thus incurring the greatest travel costs, report the highest incomes (\$81,700); residents in the High BDI Marketing Area place between these and in-state travelers
- In-state visitors and African-Americans rank last at \$52,700 and \$53,400 respectively
- As in prior waves, Mature visitors' incomes (\$78,400) exceed the Louisiana average.



Panel: Income (Household Level-demo wtd)



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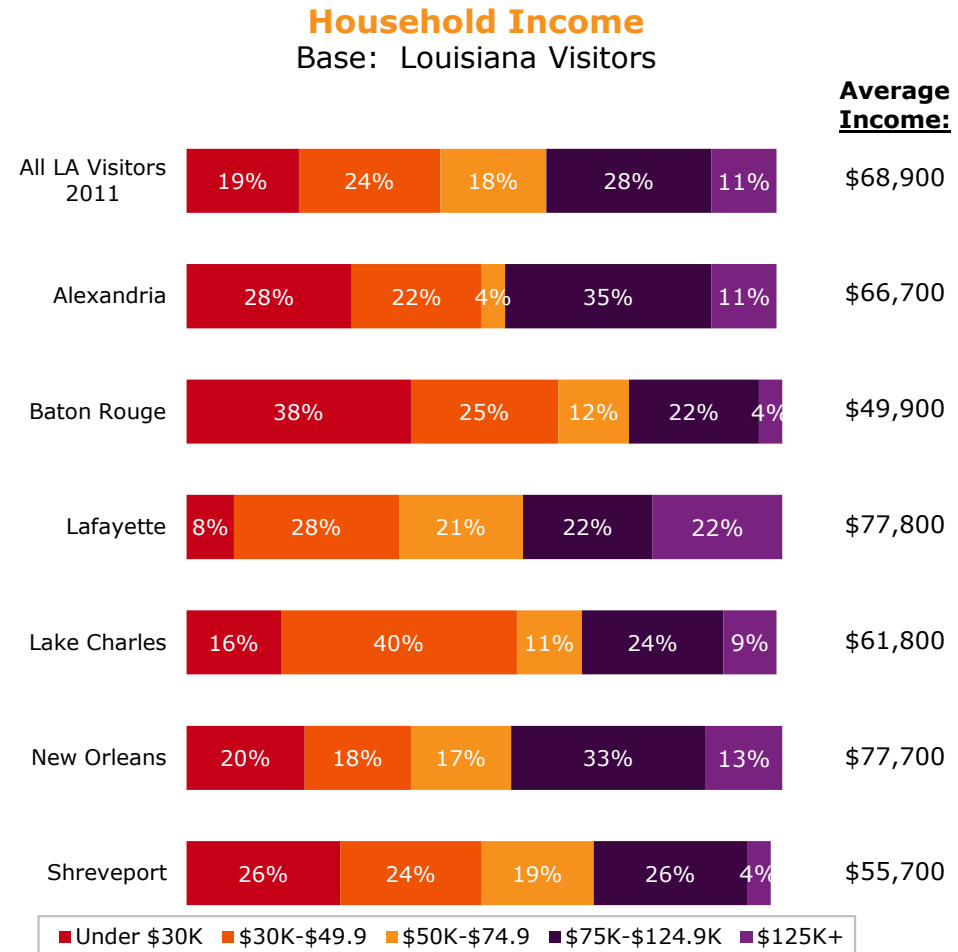
33

Visitor income by destination

Income varies by Louisiana area destination

While Louisiana visitors' incomes lag typical US travelers, some destinations draw more affluent visitors than others:

- Lafayette and New Orleans attract more affluent visitors, exceeding the average US traveler (\$75,300) as well as the average Louisiana visitor (\$68,900)
- Baton Rouge visitors earn less than visitors to other areas.



Panel: Income (Household Level-demo wtd)



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Louisiana visitor characteristics

Characteristics vary by segment, but generally reflect US travel patterns

- The greatest difference between Louisiana visitors and total US travelers occurs in ethnicity: 14% of Louisiana visitors are African-American, more than twice the national average (6%)
- The lowest marriage rate appears among African-American (27%), but they also most often live with children (44%)
- African-American visitors are also the most likely to live alone (34%)
- Most matures are married (64%) and half live with just one other person (55%).

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
% Male	37%	36%	33%	39%	34%	48%	27%	35%
% Married	61	56	58	57	54	64	27	44
Household Composition								
% One Person	21%	22%	23%	23%	20%	20%	34%	24%
% Two People	36	33	31	32	37	55	18	36
% Three or More	43	45	46	45	43	26	48	40
% With Children < 18	33	34	37	33	31	10	44	29
Ethnicity								
% Caucasian	87%	81%	82%	80%	80%	92%	-	74%
% African-American	6	14	13	14	16	6	100	17
% Hispanic	4	2	1	3	2	1	3	100

QE: Please indicate your gender. * Caution: Small base size n=30

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level-demo wtd)



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Louisiana visitor characteristics *continued*

Characteristics vary by segment

- Most Louisiana visitor groups place near the national full time employment average (60%) except for those in the Mature group, where almost half have retired
- Fewer in-state Louisiana visitors have college degrees (32%) than those outside of Louisiana, especially those who live the farthest away ("From Elsewhere at 55%")
- African-Americans and Hispanics are more often classified as Future Shapers/Makers (38%) than others
- In contrast, the Mature group more often qualifies as Yesterday/ Yesteryear consumers.

FutureView (Psychographics), Employment, Education

Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	From Louisiana	From High BDI	From Elsewhere	Mature	African-American	Hispanic*
FutureView								
% Shapers/Makers	32%	36%	34%	38%	36%	24%	41%	49%
% Today Consumers	39	37	34	36	42	41	38	18
% Yesterday/Yesteryear	28	26	30	26	22	35	17	33
Employment								
% Full Time	60%	61%	56%	64%	62%	35%	59%	71%
% Retired	18	16	14	19	14	47	8	8
% Other	22	23	30	27	24	18	33	21
Education								
% < 4 yr College Grad	52%	56%	65%	57%	44%	56%	56%	71%
% 4 yr College Grad +	47	41	32	41	55	44	41	29

FutureView and Panel: Employment, Education (Household Level-demo wtd)

* Caution: Small base size n=30



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Louisiana visitor characteristics by destination

Characteristics often vary from total Louisiana visitors (summary)

- Alexandria visitors: Young, seldom live alone and often with children, high proportion with African-American heritage
- Baton Rouge visitors: Youngest, fewest married, most likely to live alone, lowest income, most likely African-American
- Lafayette visitors: Average age, highest incomes, most often employed full-time, most often married, often Caucasian
- Lake Charles: Oldest, second-most retirees, below average incomes, often live alone, third-most Caucasians
- New Orleans: Younger, income almost as high as in Lafayette, highest education, fewer with children
- Shreveport: Average age, below average incomes, most likely Caucasian, less formal education.

Gender, Marital Status, Household Composition, Ethnicity

Base: Louisiana Visitors (except the first column)

Other Demographics	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
% Male	37%	36%	50%	32%	30%	32%	37%	30%
% Married	61	56	61	45	68	51	50	56
Household Composition								
% One Person	21%	22%	16%	30%	29%	27%	23%	24%
% Two People	36	33	29	18	17	36	33	39
% Three or More	43	45	55	51	54	37	44	37
% With Children < 18	33	34	45	38	54	26	31	33
Ethnicity								
% Caucasian	87%	81%	76%	63%	82%	80%	74%	85%
% African-American	6	14	21	29	11	18	20	13
% Hispanic	4	2	2	6	-	8	3	-

QE: Please indicate your gender.

Panel: Marital Status, Household Members, Children, Ethnicity. (Household Level-demo wtd)



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Louisiana visitor patterns by destination *continued*

FutureView (Psychographics), Employment, Education Base: Louisiana Visitors

Other Demographics %	Total US Travelers	Louisiana Visitors	Alexandria	Baton Rouge	Lafayette	Lake Charles	New Orleans	Shreveport
FutureView								
% Shapers/Makers	32%	36%	32%	41%	32%	29%	42%	39%
% Today Consumers	39	37	30	33	32	39	36	39
% Yesterday/Yesteryear	28	26	36	25	31	31	22	21
Employment								
% Full Time	60%	61%	64%	59%	84%	59%	66%	59%
% Retired	18	16	10	10	13	16	9	19
% Other	22	23	26	31	3	25	25	22
Education								
% < 4 yr College Grad	52%	56%	62%	49%	57%	77%	42%	65%
% 4 yr College Grad +	47	41	39	48	43	23	54	33

FutureView and Panel: Employment, Education. (Household Level-demo wtd)



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Trip Characteristics and Satisfaction

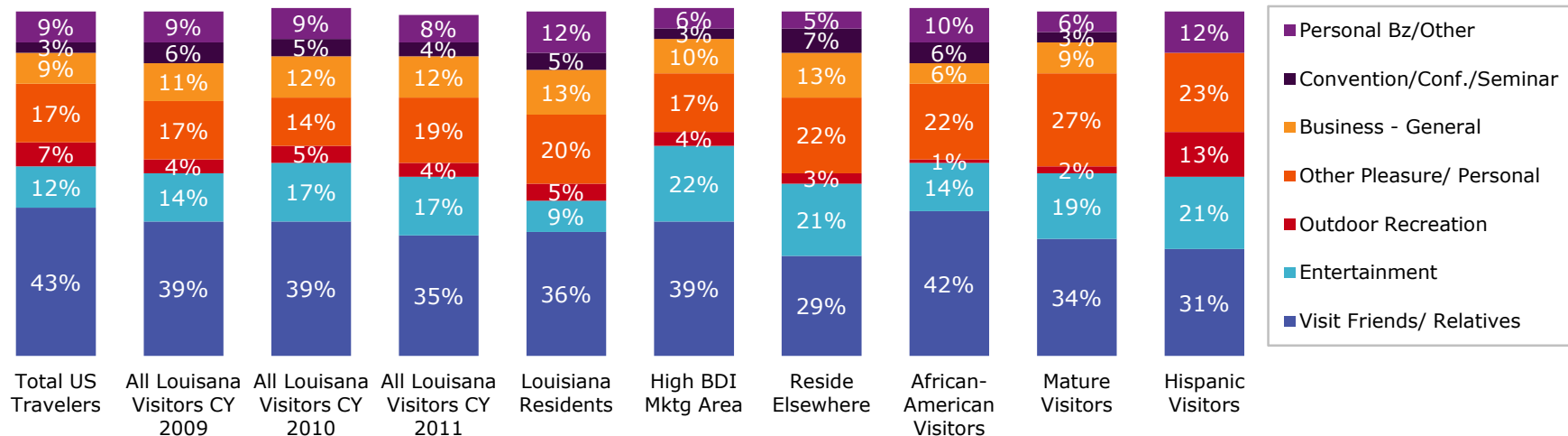


Trip purpose

Visitors usually come to Louisiana for fun

- Although fewer than for Total US Travelers (43%), most visitors primarily come to Louisiana to *visit friends and family* (35%), especially African-American visitors (42%)
- Mirroring last year, mature visitors, Hispanics, and those residing out-of-state (either the High BDI marketing area or Elsewhere) cite *entertainment* as their reason for visiting more often than average
- Business* travel, while still a relatively small percentage, is more prevalent among those who reside farther away ("Reside Elsewhere"), but declines from the prior two years (20% from 25% in both 2010 and 2009) within that group.

Primary Purpose of Trip



79%	74%	74%	76%	70%	81%	75%	79%	81%	88% = Net Leisure
12%	17%	17%	16%	18%	13%	20%	11%	13%	- = Net Business

Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)



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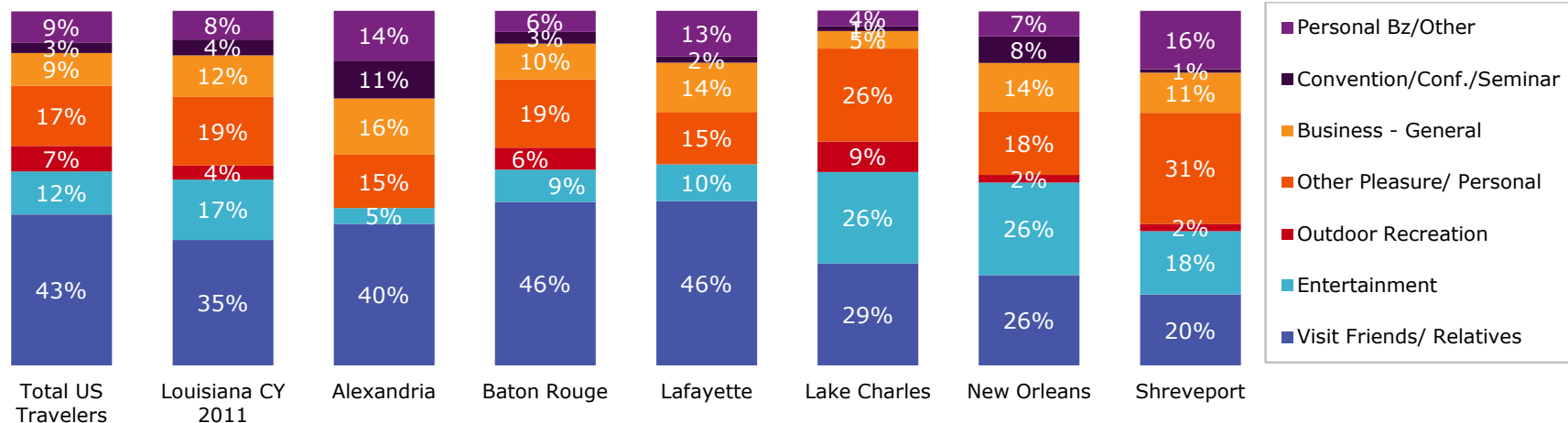
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Trip purpose by destination

Visitors usually come to Louisiana for fun

- *Business* visits occur more often in New Orleans, especially *conventions*, than elsewhere
- Gaming participation (shown later) ranks highest in Shreveport and Lake Charles; both show higher levels for “*other pleasure/personal*” than other areas
- Tourism in Alexandria, Baton Rouge, and Lafayette relies more heavily on visits to *friends and family* than other Louisiana areas.

Primary Purpose of Trip



79%	76%	59%	81%	72%	89%	72%	71%	= Net Leisure
12%	16%	27%	13%	16%	6%	21%	12%	= Net Business

Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)



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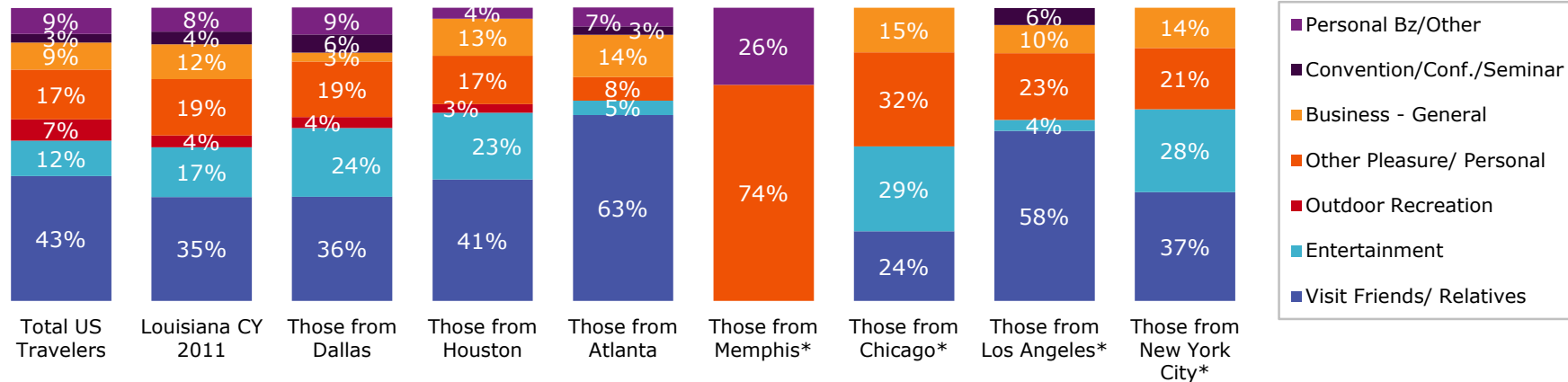
41

Trip purpose by visitor source

Visitors usually come to Louisiana for fun

- Those from large, distant cities tend to come for similar purposes as others
- Caution: Very small sample for Memphis, Chicago, Los Angeles, and New York City.

Primary Purpose of Trip



79%	76%	82%	84%	76%	74%	85%	85%	86%	= Net Leisure
12%	16%	9%	13%	17%	-	15%	16%	14%	= Net Business

* Caution: Very small base size n<20

Q1b. Which of the following was the primary purpose of your trip. . . (Trip Level – demo wtd)



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Purpose and accommodations

Visitors often see friends and relatives and stay with them

- Compared to business travelers, leisure travelers more often: drive, stay with friends/relatives, and travel with children
- Not surprisingly, business travelers fly more frequently, stay longer, and usually pay for lodging (hotel/motel)
- About one in five business visitors fly (19%) – more than twice as often as leisure visitors
- Business travelers more often live in-state (38%) than leisure travelers (31%) – a reversal from prior waves (not shown).

LOUISIANA VISITORS Trip Choices (Trip Level)	Total 2009	Total 2010	Total 2011	Leisure	Business
PRIMARY TRIP PURPOSE					
NET Leisure/Personal	74%	74%	76%	100%	-
Visit Friends/Relatives	39	39	35	47	-
Entertainment/Sightsee	14	17	17	22	-
NET Business	17	17	16	-	100%
Personal Bs/Other	9	9	8	-	-
PRIMARY MODE					
% Own Auto/Truck	73%	70%	77%	82%	58%
% Air Travel	15	15	11	9	19
AVG # IN TRAVEL PARTY	2.8	2.9	2.8	2.9	2.5
% Traveling Solo	28%	28%	27%	19%	67%
% Traveling With Children	24	23	22	25	9

Q1b: Which was the primary purpose of trip?

Q2b: Which was the primary mode of transportation?

Q3a: Please indicate number of travel party members (including yourself) under 18 and 18+. (Trip Level – demo wtd)

LOUISIANA VISITORS Lodging (State Level)	Total 2009	Total 2010	Total 2011	Leisure	Business
AVG # NIGHTS (if any)	3.0	3.2	3.1	3.0	4.2
Private Home	1.1	1.2	1.1	1.3	0.4
Hotel/Motel	1.4	1.6	1.6	1.3	3.0
All Other	0.3	0.2	0.2	0.1	0.4

Q4f: Please specify the number of nights stayed at each listed accommodation (State Level – demo wtd).

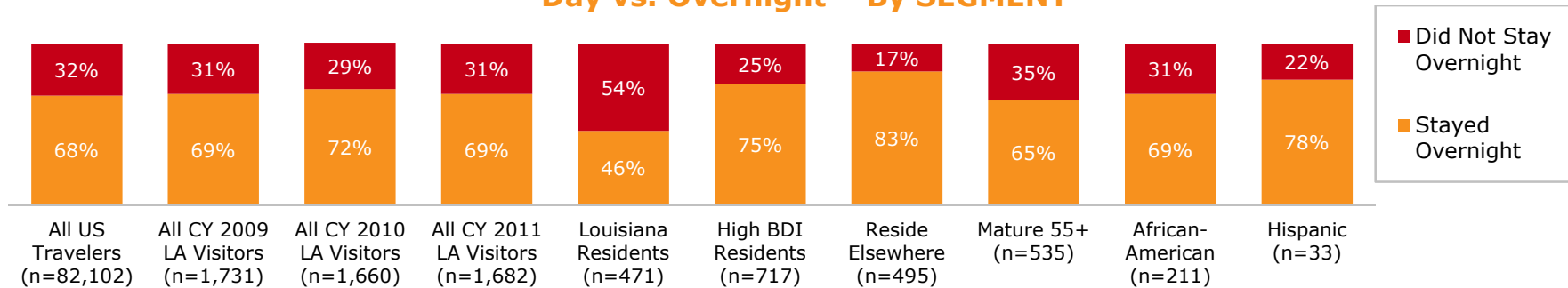


Overnight stays

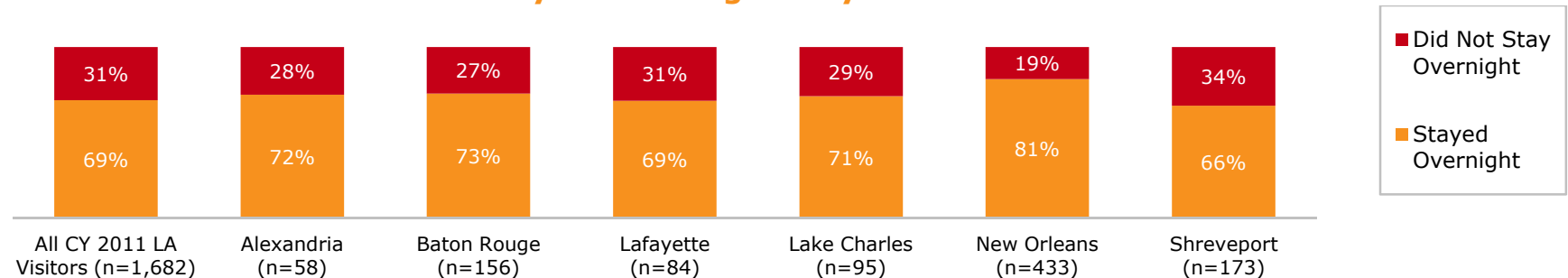
Most visitors spend at least one night, unless they live in-state

- Seven in 10 Louisiana visitors stay overnight, similar to other US travelers and last year
- Logically, those who live in-state are most likely to take a day-trip (54%); conversely, those who travel the greatest distance are most likely to stay overnight (83%)
- As might be expected among the cities, New Orleans visitors most often spend the night (81%)
- Expect for Louisiana residents, mature visitors more often come just for the day (35%) than others.

Day vs. Overnight – By SEGMENT



Day vs. Overnight – By DESTINATION



Q4e. Please specify which visits included at least one overnight stay (State Level – demo wtd)

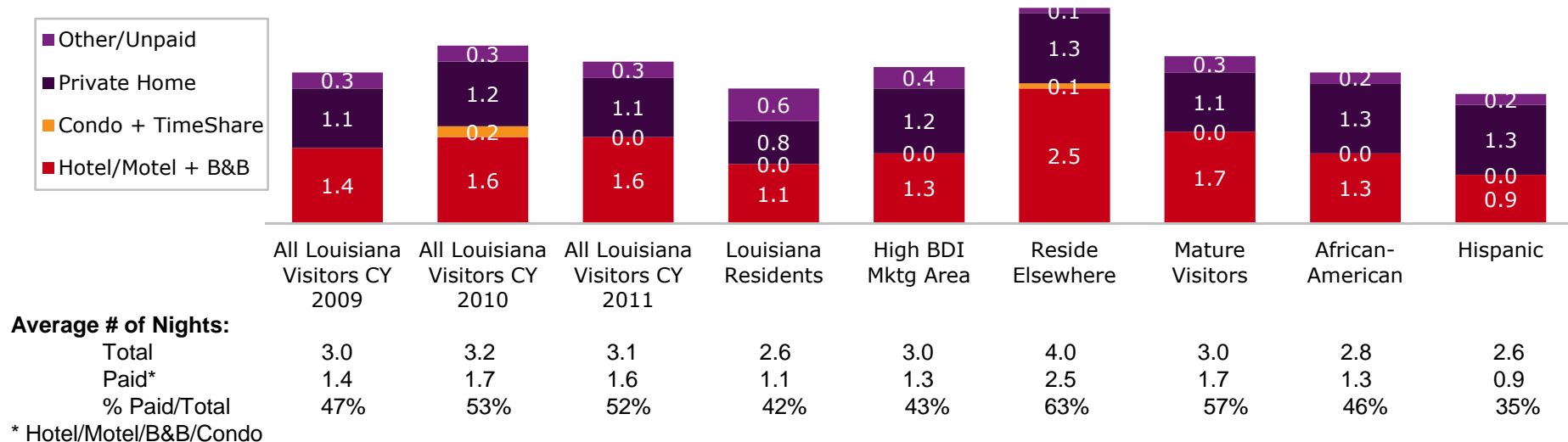


Accommodations by segment

About half (53%) pay for accommodations

- The largest share of Louisiana visitors come to see *friends/family* and many stay with them rather than in hotels/motels/B&Bs/condos
- As shown previously, Louisiana residents are least likely to take an overnight trip in Louisiana; even when they do, they spend relatively few of those nights (42%) in paid accommodations
- Those traveling farthest, living outside of Louisiana and the High BDI marketing area, stay the longest (4.0 nights) and more often opt for hotels/motels (63% paid)
- Proportionately more Hispanics stay in a private home than any other segment and ties Louisiana residents for the shortest length of stay.

Length of Stay
Base: Overnight Visitors



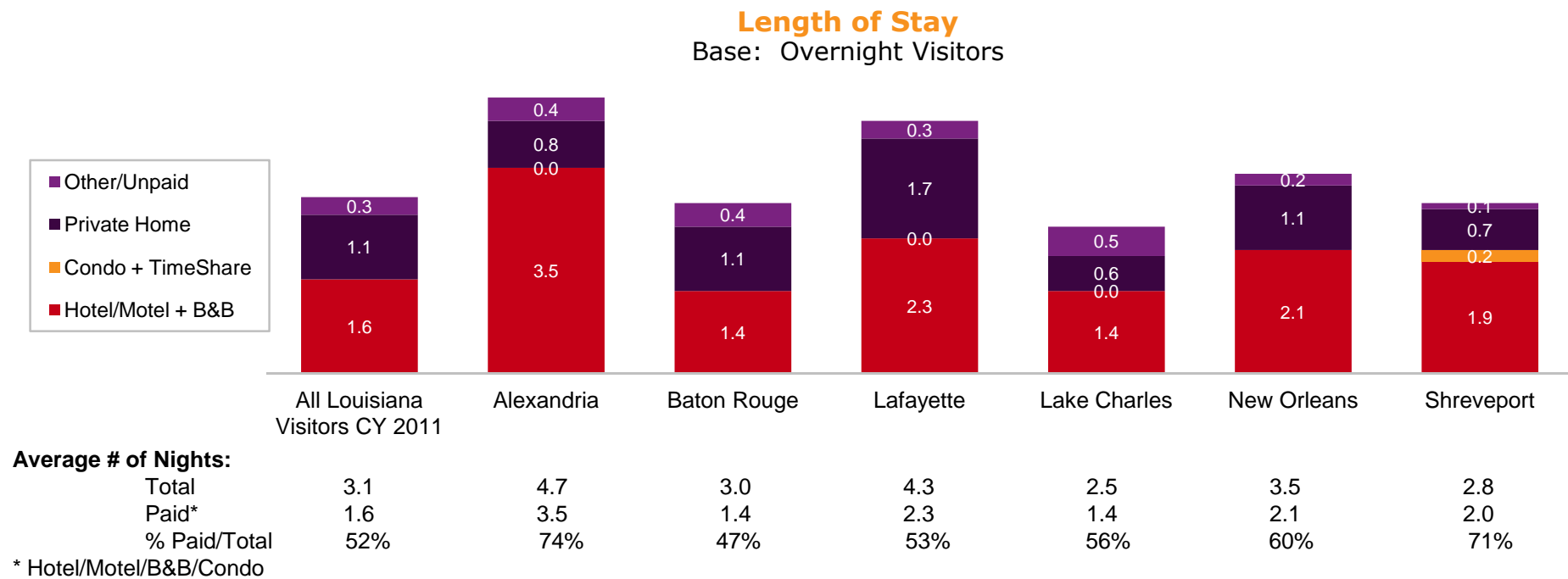
Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)



Accommodations by destination

Visitors stay longer in Alexandria, Lafayette, and New Orleans

- Not only does New Orleans attract more overnightrters (earlier slide), but they stay longer and more often opt for hotels than average
- Alexandria and Shreveport visitors choose hotel stays even more often than New Orleans guests
- Consistent with the purpose of trip (more who visit friends and relatives), Baton Rouge and Lafayette guests more often stay in private homes.



Q4f. Abridged: Of the overnights in Louisiana, specify the number stayed at each accommodation (State Level)

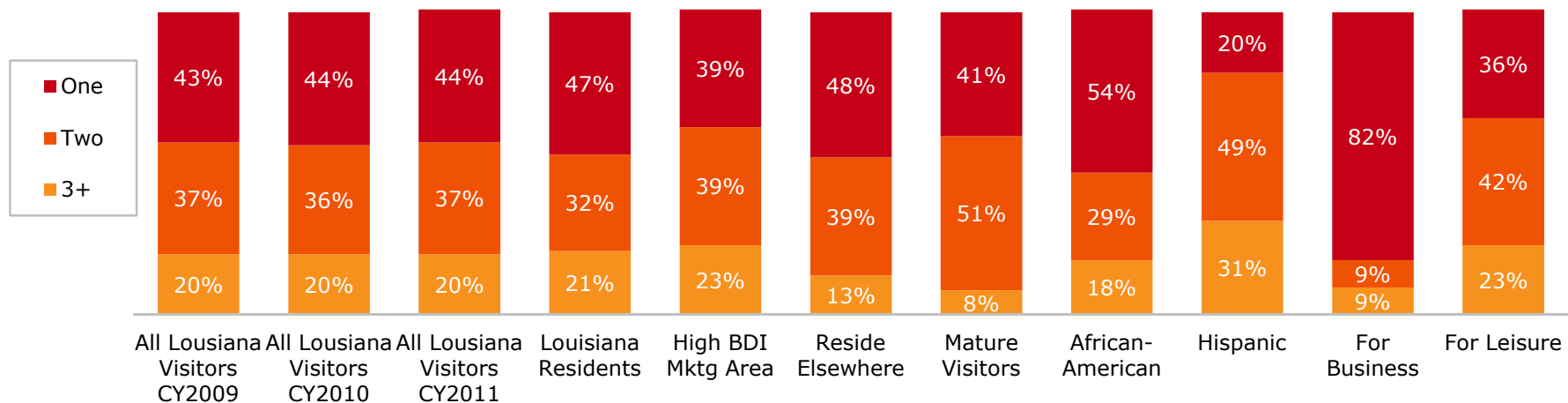


Travel companions by segment

Visitors often travel solo or in pairs*

- About one travel party in five that visits Louisiana (19%) includes children
- Not surprisingly, business travelers (82%) most often travel alone, followed by African-Americans and those living outside of the High BDI area (53%) who, as shown earlier, also tend to be heavier business travelers
- Mature visitors also tend toward smaller travel parties, only 8% travel in groups of 3 or more
- Hispanics least often travel solo (20%) and are the most likely to travel as a family (31%).

Number of Household Members in Travel Party (Including Self)



Average # of Household Members in Travel Party:

Total	2.0	1.9	1.9	1.9	2.1	1.7	1.7	1.8	2.5	1.4	2.1
% w/Children	20%	20%	19%	22%	20%	13%	3%	21%	30%	8%	22%

*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."

Q3b. Of travelers, how many live in your household, including yourself (Household State Level – demo wtd)

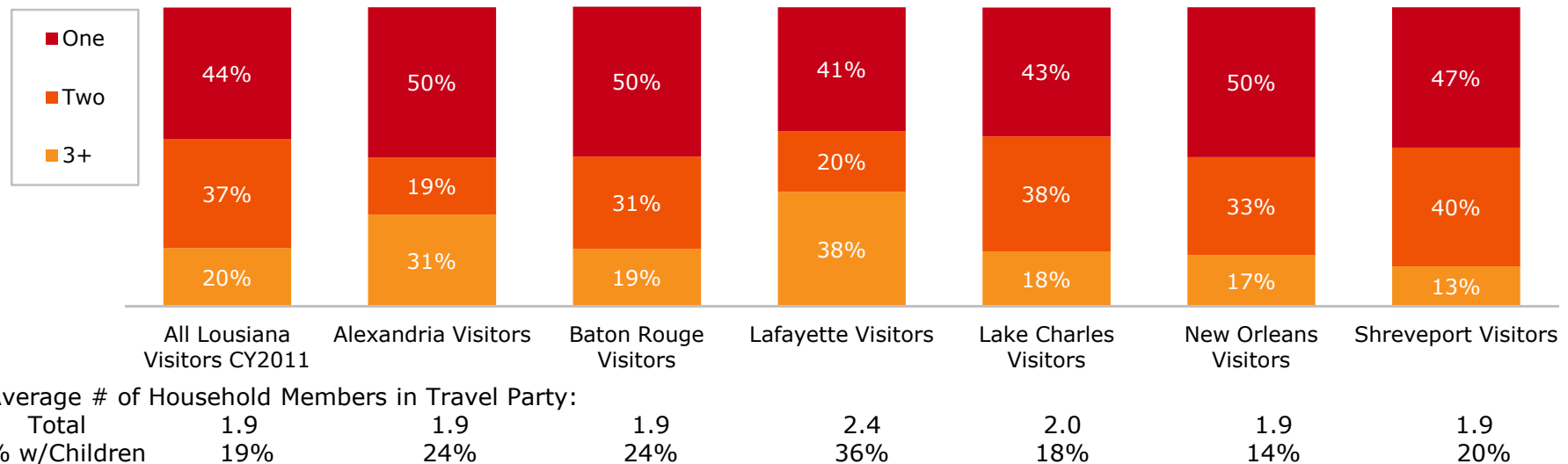


Travel companions by destination

New Orleans draws the fewest families with children

- Travelers with children go to destinations where the primary purpose is to *visit friends and relatives*, notably Alexandria, Baton Rouge, and Lafayette
- New Orleans tends to attract adults who, as shown later, indicate greater interest in *shopping, dining/nightlife, history/museums/art galleries, urban sightseeing, and special events*
- Also with relatively low appeal to families, Lake Charles and Shreveport both attract *casino/gaming* visitors.

Number of Household Members in Travel Party (Including Self)



*NOTE: The travel party could include non-household members, which theoretically, would be covered by another household. The proportion traveling in pairs may be somewhat lower than expected because "couples" who are not married or living together would respond as "one."

Q3b. Of travelers, how many live in your household, including yourself (Household State Level – demo wtd)

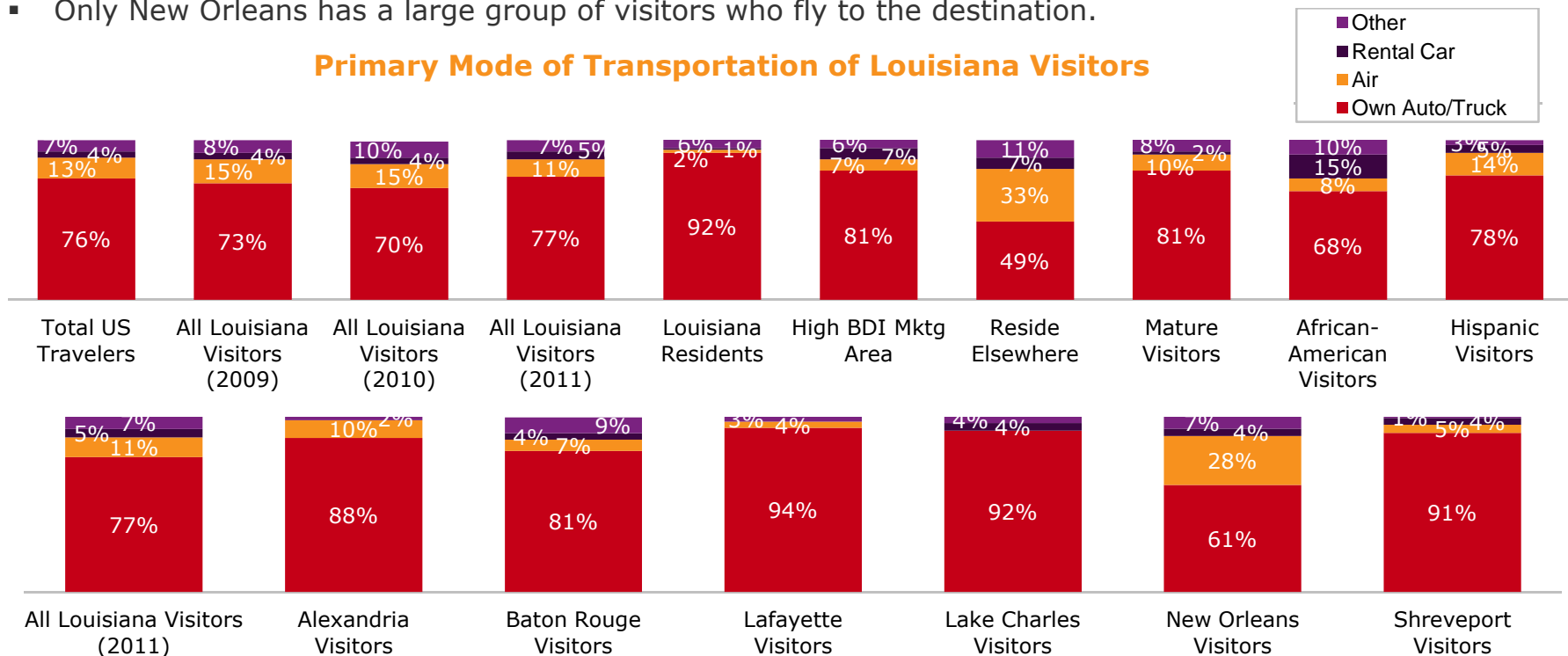


Primary mode of transportation

Most travelers drive to their destination

Although overall Louisiana visitors choose transportation modes similar to total US travelers, distance notably affects transportation choice:

- As expected, Louisiana residents drive more often to in-state destinations than any other segment
- Conversely, residents outside both the state and the High BDI Marketing Area fly most often
- As noted in the prior two waves, African-Americans rent a car to visit Louisiana more often than most others
- Only New Orleans has a large group of visitors who fly to the destination.



Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)



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Trip timing

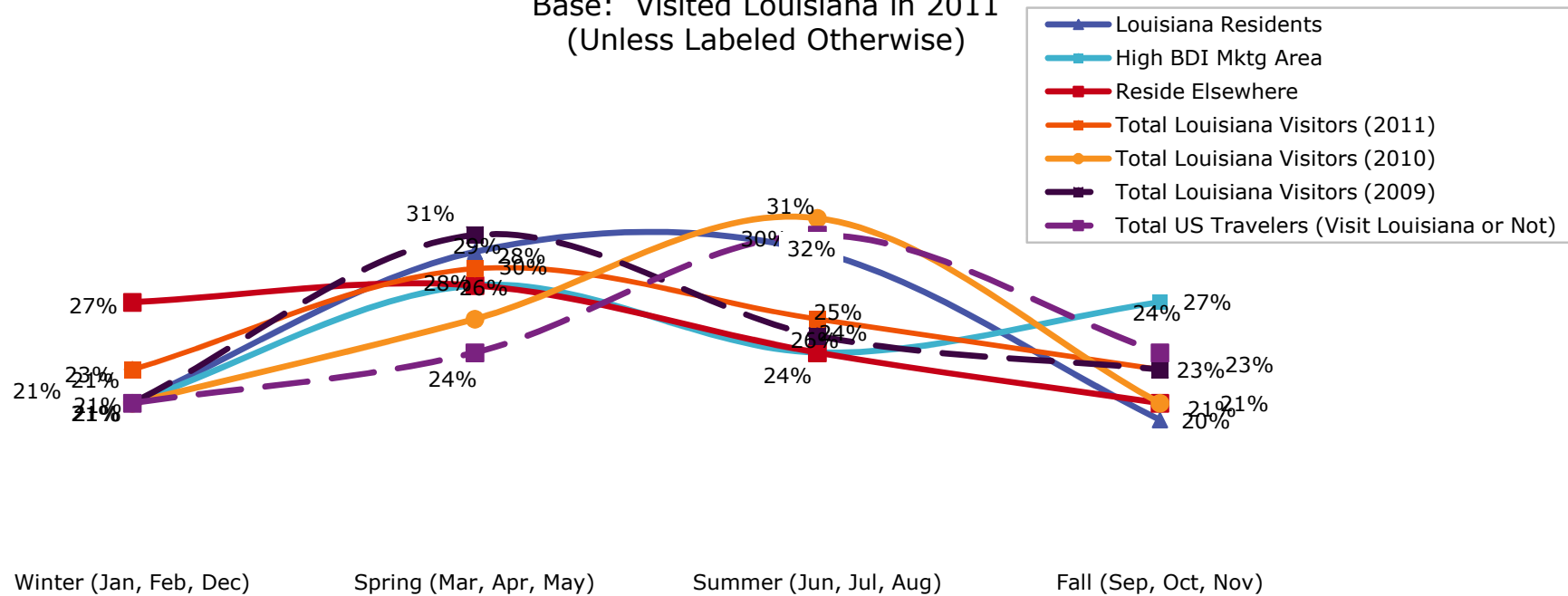
Nationally, most travel occurs in Summer, but not for Louisiana

Similar to prior years (except 2010), Spring leads other seasons:

- 2011 Louisiana travel peaks in the Spring for non-Louisiana residents
- Louisiana residents travel in-state more often in Spring and Summer and less in Fall and Winter.

TIMING OF TRIP BY SEASON

Base: Visited Louisiana in 2011
(Unless Labeled Otherwise)



Month Traveled (wave of questionnaire) (Household Level)



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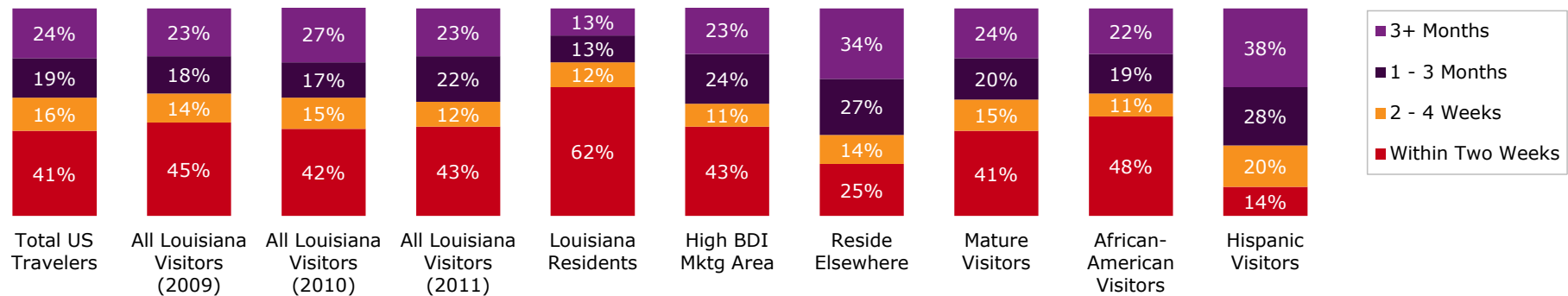
50

Trip planning – timing by segment

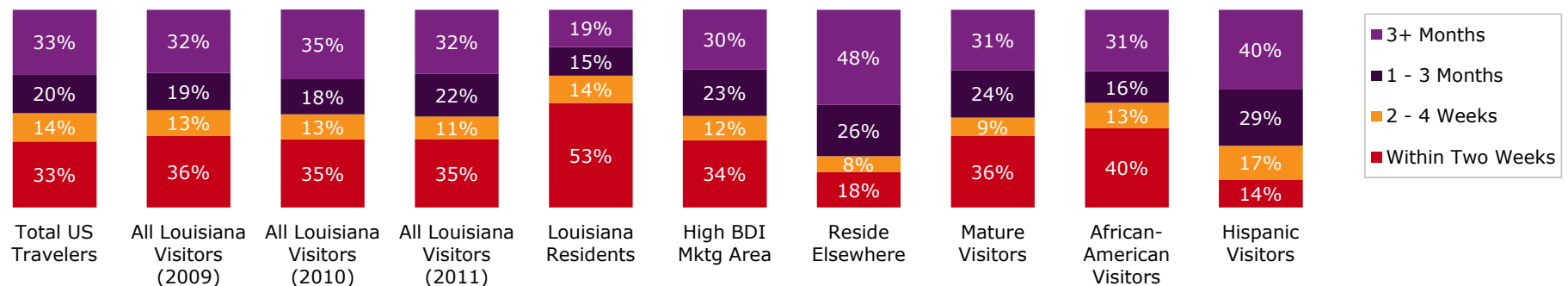
Logical patterns occur for trip planning

- With fewer spending the night, in-state visitors consider and decide to take relatively spontaneous trips
- Conversely, those traveling from farther distances (reside elsewhere) have longer planning horizons
- Hispanics (small sample) report longer planning periods.

Time Decided On Trip Before Visit to Louisiana (except Total US Travelers = all trips)



Time Considered Trip Before Visit to Louisiana (except Total US Travelers = all trips)



Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)

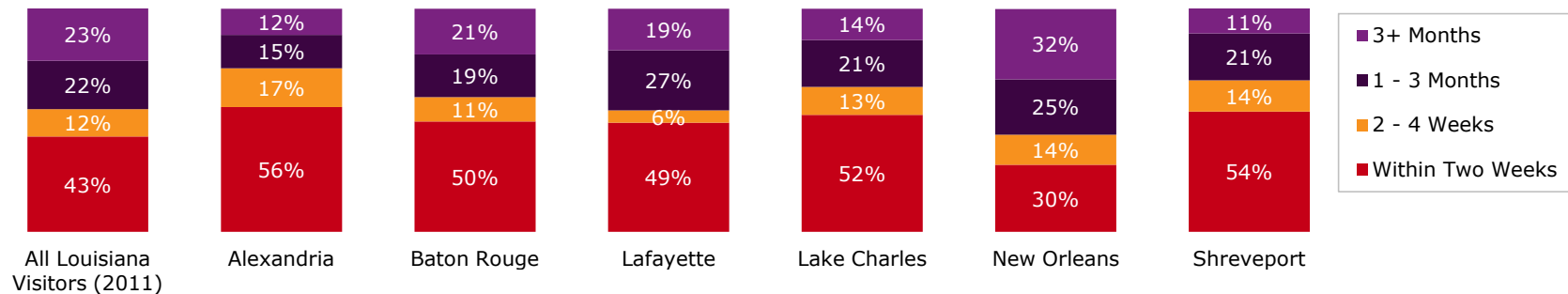


Trip planning – timing by destination

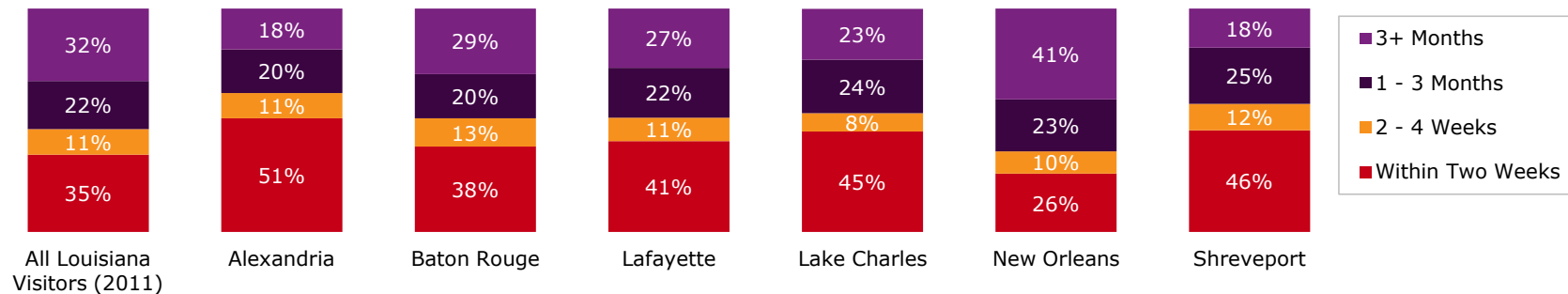
Trip planning relates to distance from primary source markets

- New Orleans visitors take longer to plan and decide on a trip, as is logical for the destination that has the highest proportion (39%) living outside Louisiana and High BDI areas
- Of the remaining Louisiana destinations, half or more travel there relatively spontaneously (49%+ decide with two weeks).

Time Decided On Trip Before Visit to Louisiana



Time Considered Trip Before Visit to Louisiana



Q4i. Please indicate how far in advance you considered traveling to . . . // Decided to visit . . . (State Level-demo wtd)



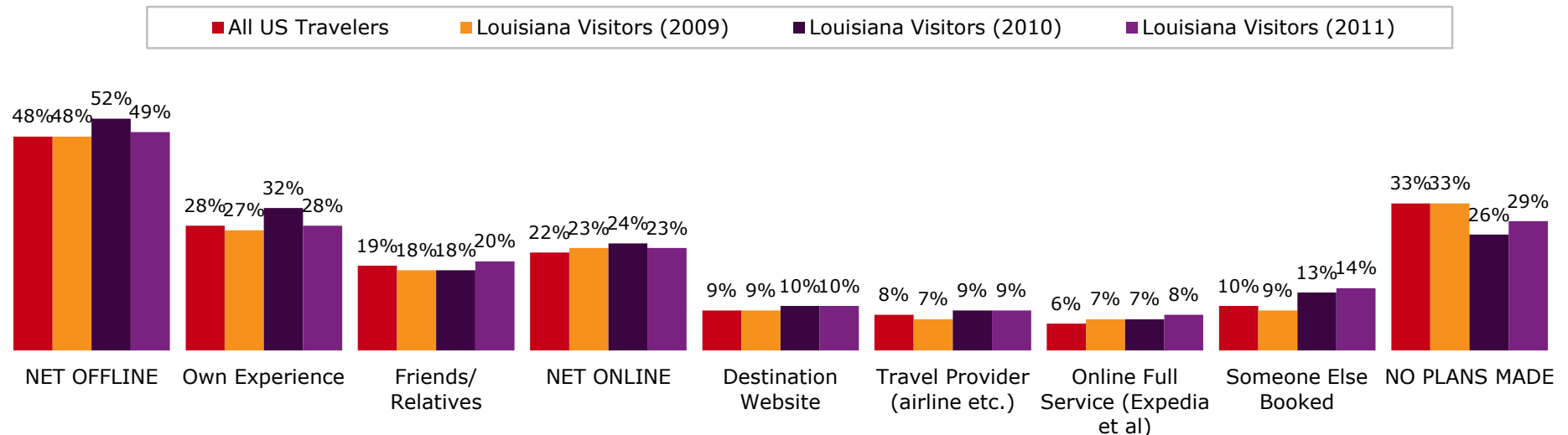
Trip planning – information sources

Louisiana visitors use the same sources as total US travelers

Similar to total US travelers and similar to the past as well, Louisiana planners rely on their *past experience* and *word of mouth* as key sources of information:

- Although the Internet is a popular place to gather information (22% for all travelers and 23% for current Louisiana visitors), just 1 in 10 currently uses destination websites
- Printed information (1% - 4%) has minimal reach and impact.

Information Sources to Plan a Trip Ranked by Louisiana Visitors 2011 (5%+)



Q4j. What sources did you use in planning your trip to . . . (State Level – demo wtd)



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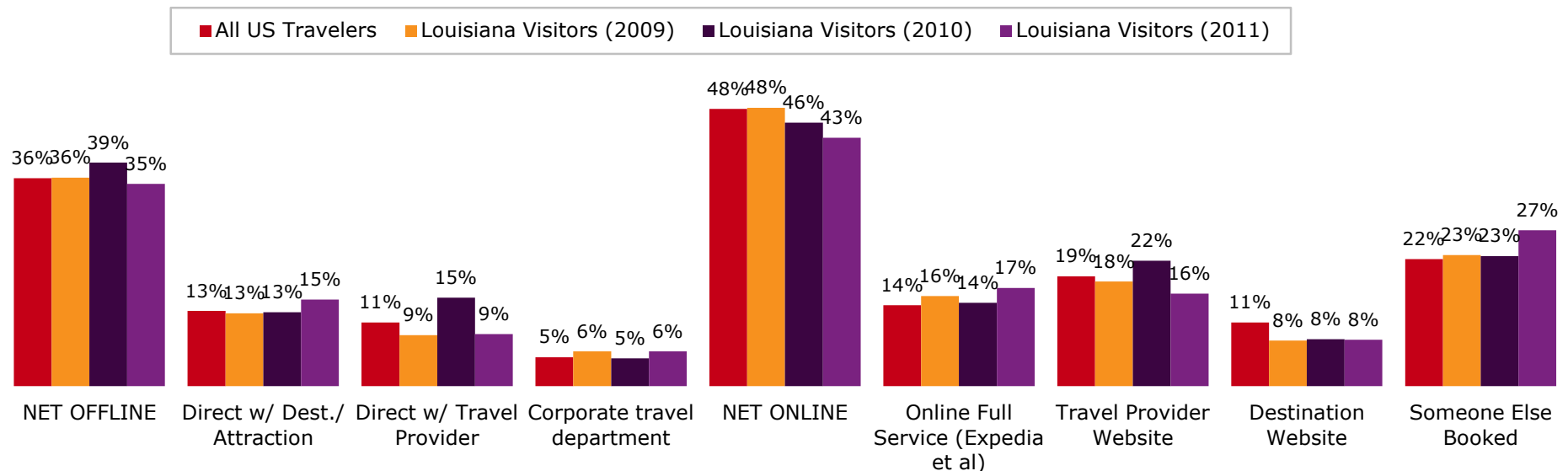
Trip booking methods

Online booking by Louisiana visitors slightly below overall US travelers

Gathering information from similar sources, Louisiana visitors book their trip components in ways similar to US travelers:

- Both total travelers and Louisiana visitors book trips online more often than offline – but the gap is smaller among Louisiana visitors (43% vs. 35%) since they are less likely to book online than average travelers
- However, Louisiana visitors use online full service travel agencies (17%) and travel provider websites (16%) as their top booking methods.

Method Used to Book Trip Components
Ranked by Louisiana Visitors 2011 (5%+)



Q4k. Please indicate the method(s) you used to book your trip . . . (State Level – demo wtd)



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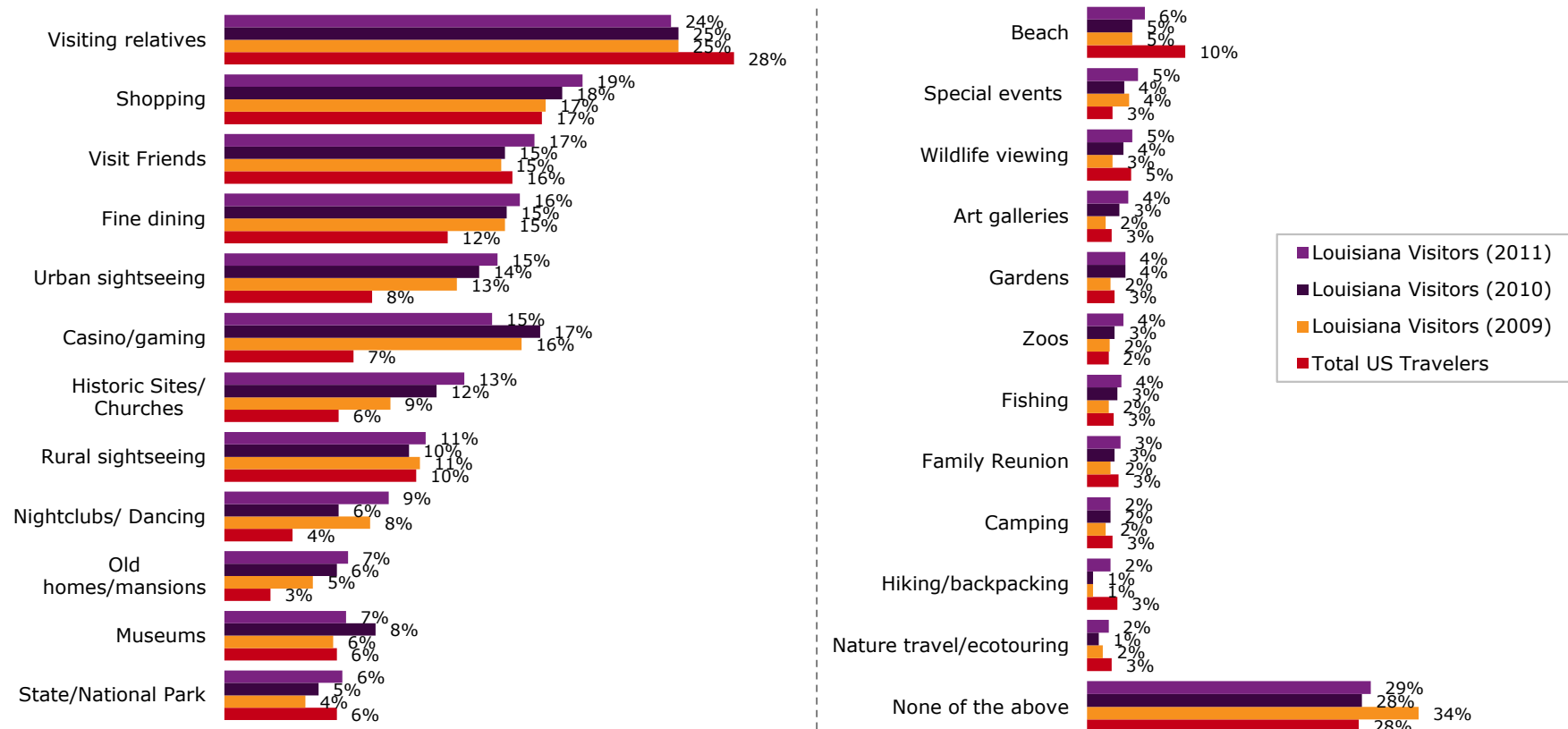
Trip characteristics: overall vacation activities

Louisiana visitors come to visit, shop, gamble, and eat

Compared to all US travelers, Louisiana visitors noticeably more often play *casino games*, *sightsee in cities*, visit *historic areas* (*Historic Sites, Churches, Old Homes/Mansions*), and enjoy *fine dining* and *nightclubs*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



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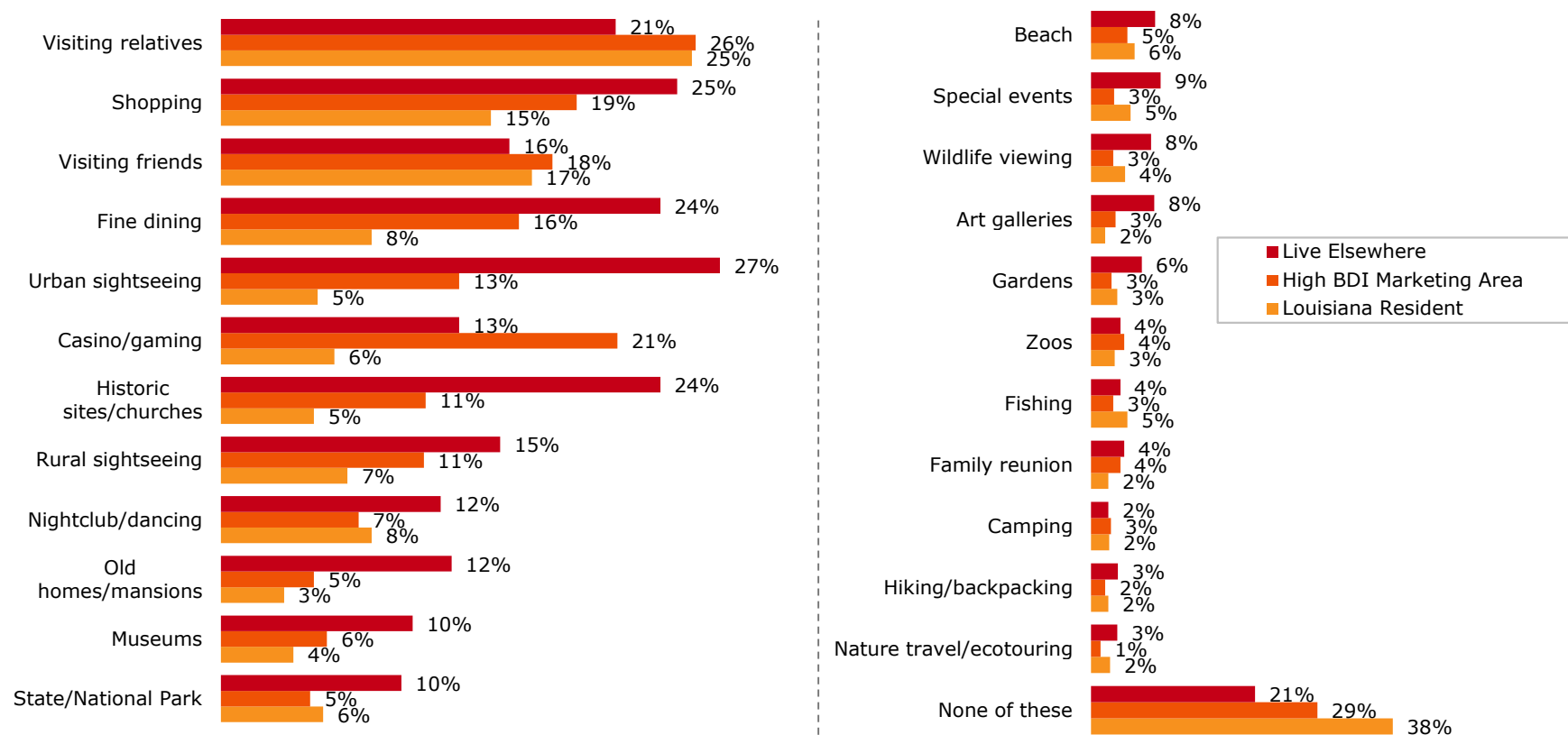
Trip characteristics: vacation activities by residence

In-state residents often visit friends and relatives

However, they lag non-residents on most other leading activities. High BDI Marketing Area residents *gamble* more often than others while those living further away take greater advantage of nearly all other tourism features.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



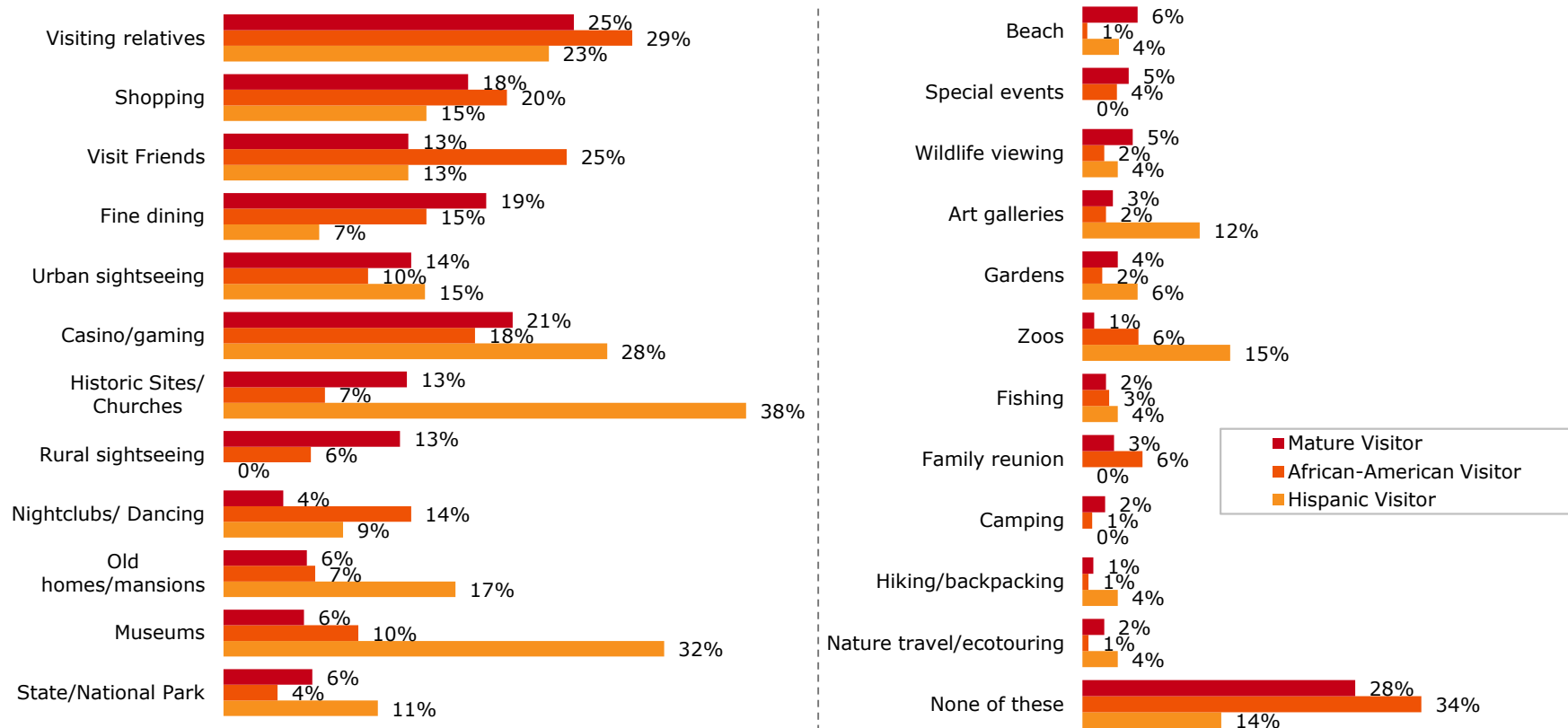
Trip characteristics: vacation activities by segment

Mature visitors visit relatives and casinos, dine well, and shop

African-Americans, consistent with their travel purpose, often *visit friends* and *relatives* while in Louisiana. They also go to *nightclubs* much more often than others (14%). Hispanics often visit *historical sites* and *museums*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with ,2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



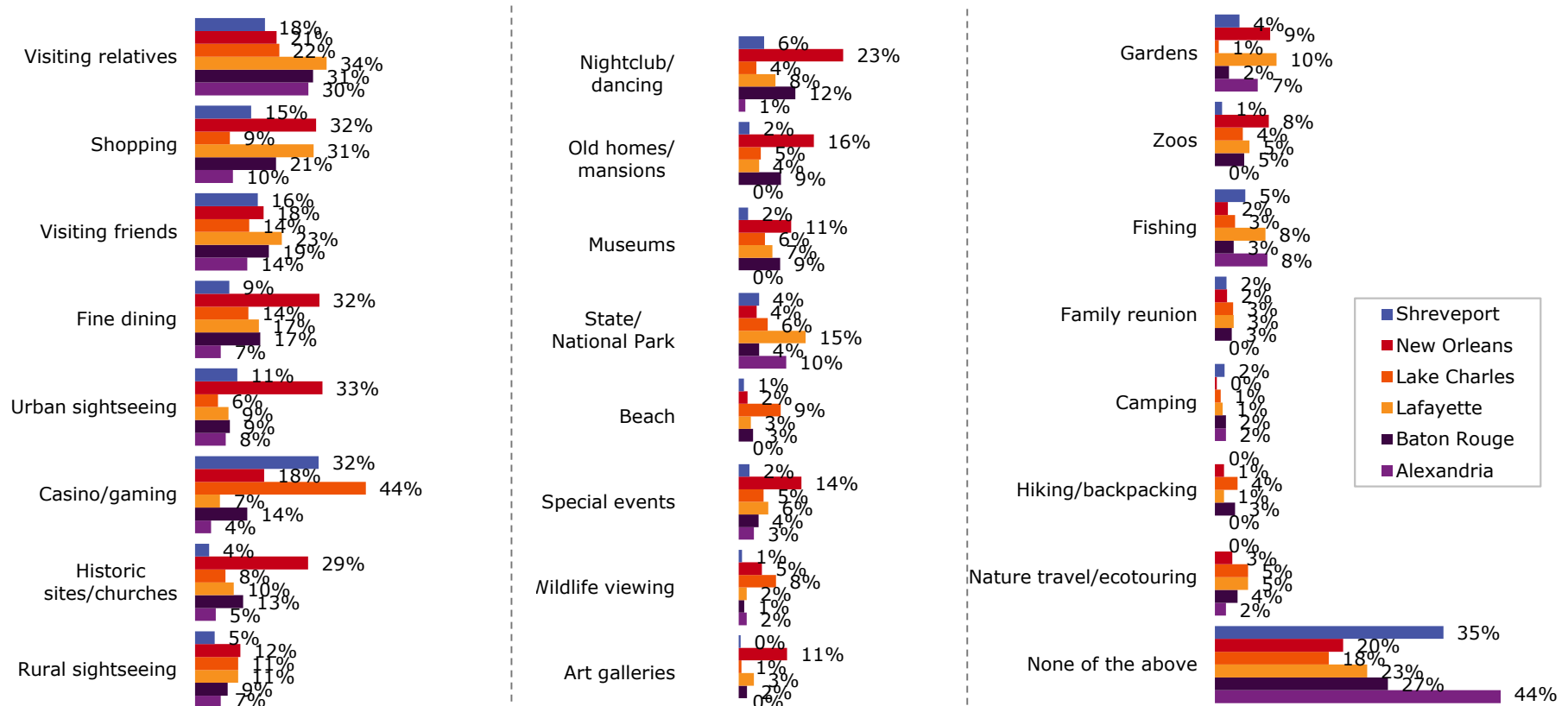
Trip characteristics: vacation activities by destination

Activities vary widely by destination

The most distinct destinations are New Orleans, which “owns” *history* and *museums*, *urban sightseeing*, *nightlife*, *dining*, and *special events*, and Lake Charles and Shreveport, which lure *casino/gaming* visitors.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)



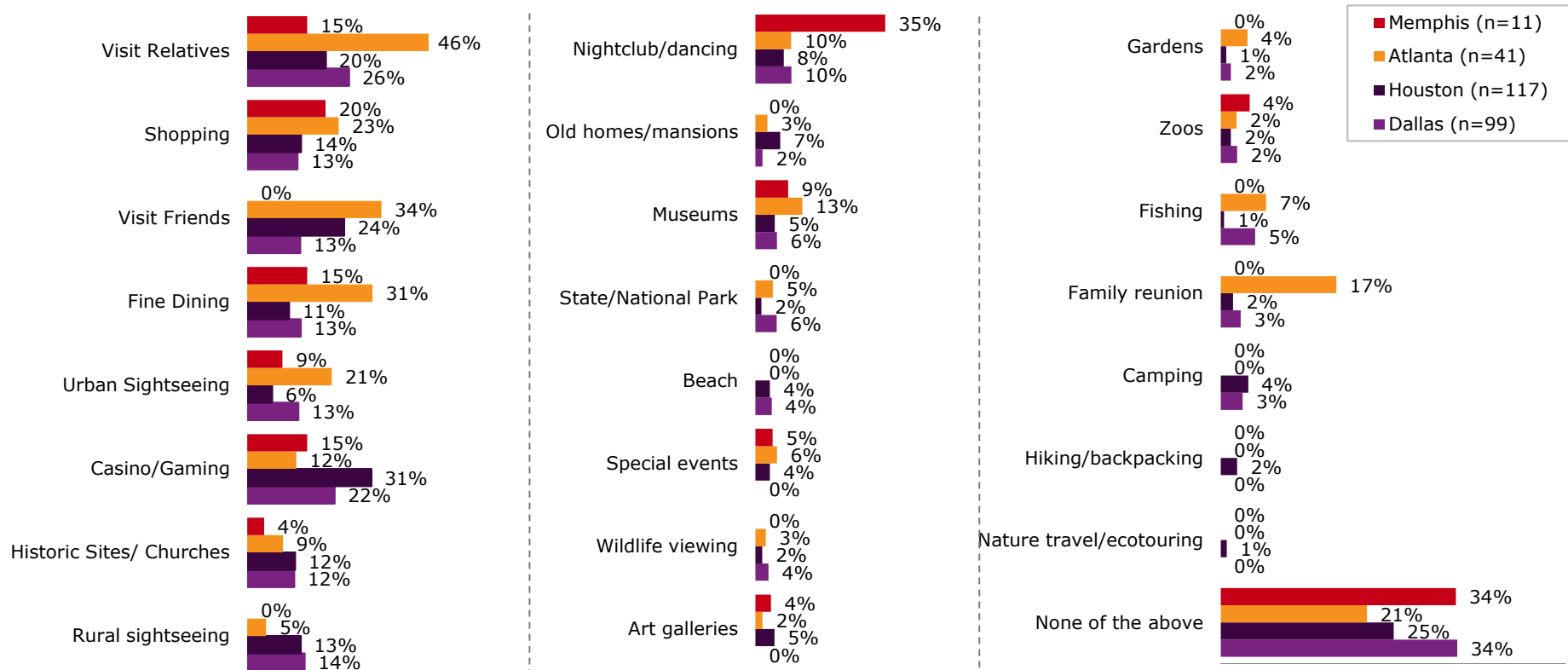
Trip characteristics: vacation activities by source

Activities vary by source of visitors

Besides visiting friends and/or relatives, *casino/gaming* ranks as the top activity by visitors from **Dallas** and **Houston**, the same result as a year ago. Although **caution** is advised because of the very small sample, **Atlanta** visitors take advantage of the restaurants (*fine dining*) and **Memphis** visitors enjoy the *nightclubs*, also the same as in CY 2010.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Activities with <2% for Total Louisiana Visitors not shown)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

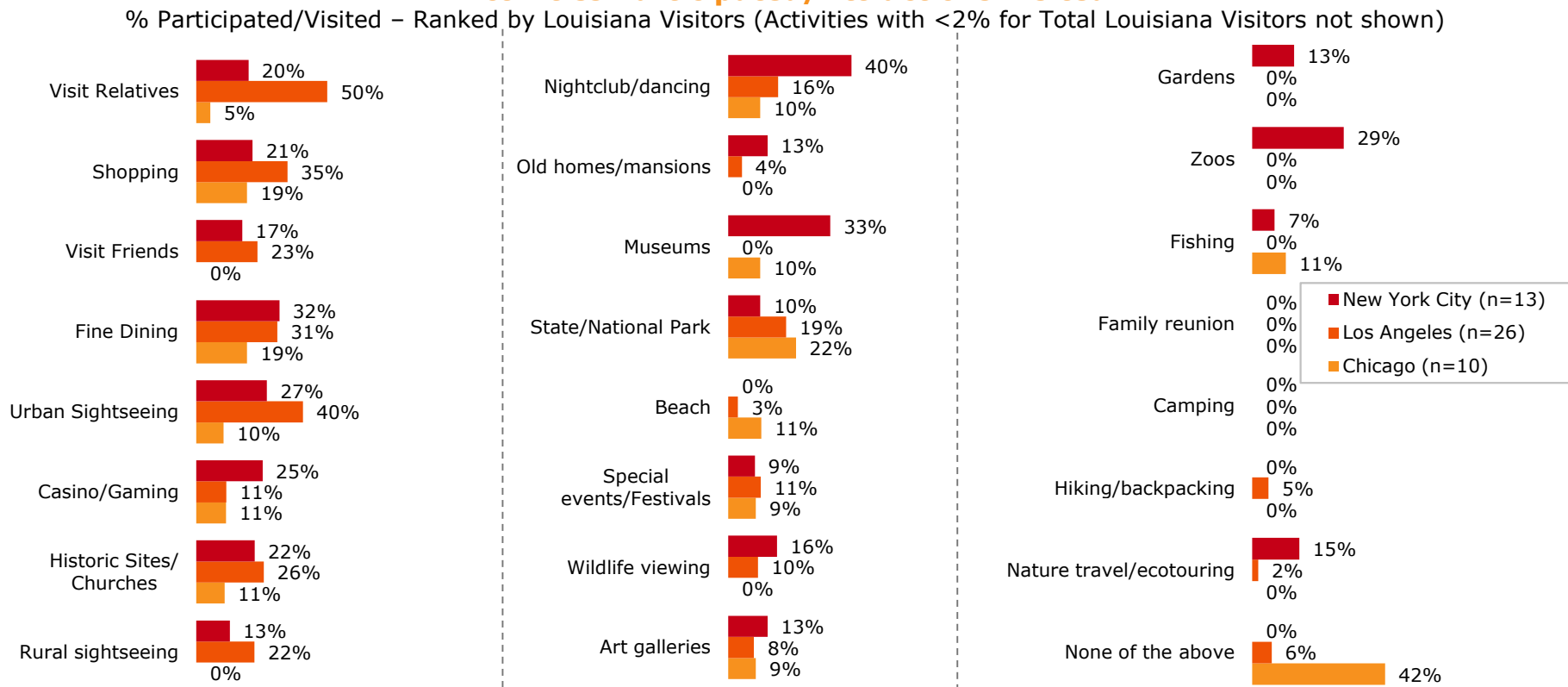


Trip characteristics: vacation activities by source

Activities vary by source of visitors

Again, with **caution** because of the very small sample, visitors from the three biggest US cities focus on similar activities on vacation, with *fine dining* and *urban sightseeing* topping the list. Those from **New York City** add *museums* and *nightclubs*; those from **Los Angeles** add *shopping* and *historic sites/churches*, and those from **Chicago** add *state/national parks*. None seek the most outdoorsy options (*camping*, *hiking*).

Activities Participated/Attractions Visited



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

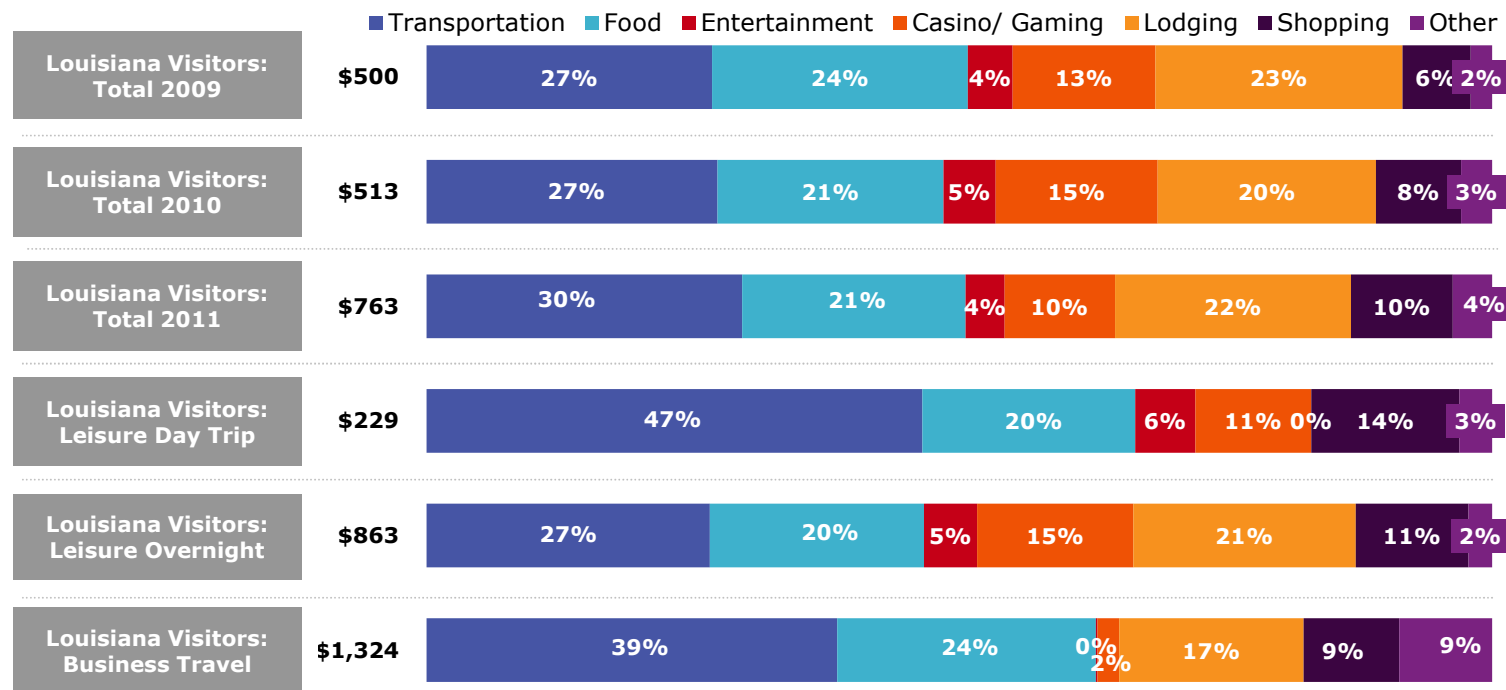


Trip expenditures by purpose

Visitor spending continues to recover

- Overnight visitors spend almost four times as much as day trip visitors (\$863 vs. \$229)
- Overnighters stay longer, of course, and allocate a large share of their travel budget for lodging
- Business travelers spend more on transportation (consistent with their greater likelihood of flying).

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.

Note 2: Not all respondents classified as business or leisure (personal business and other)

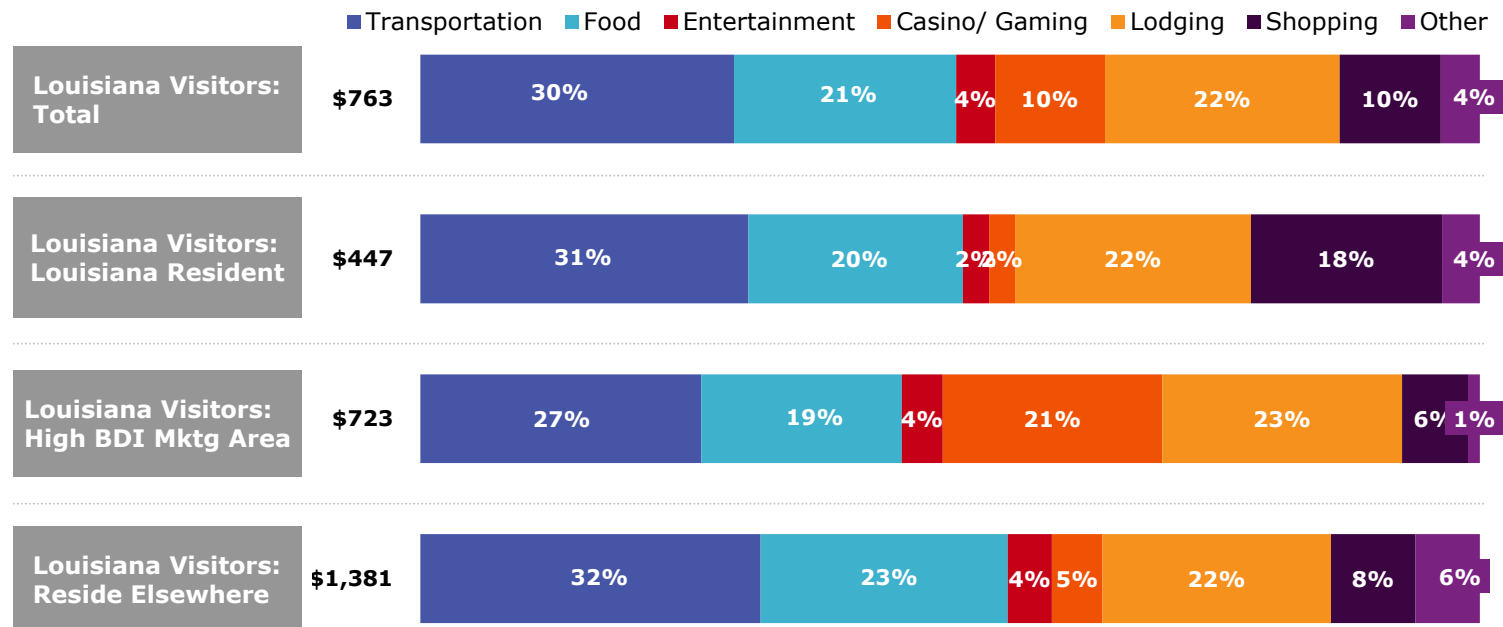
Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

Trip expenditures by residence

Value of visitors climbs with distance traveled

- With greater distance, those outside the state and outside the High BDI Marketing area spend more of their travel budgets for transportation (32%, presumably many fly)
- High BDI Marketing Area residents spend more (21%) on *gaming* than others, averaging \$516 (excluding non-gamblers)
- Transportation* consumes the largest bite out of in-state visitors' budgets; *lodging* and *food* vie for second-place.

Average Spending in Louisiana by Trip Type
Total Spending by Travel Party (Total Spending, including 0)



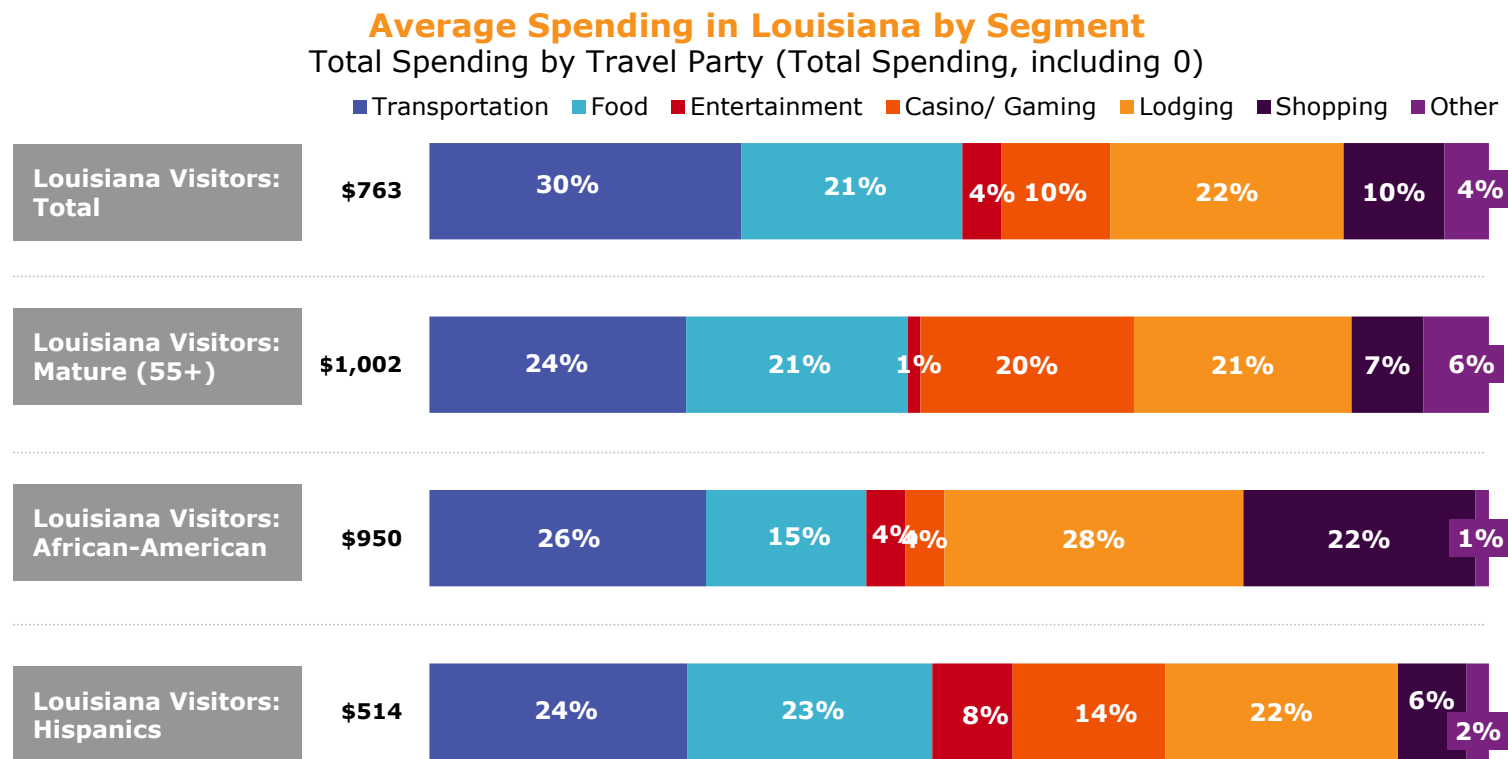
Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other. Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)



Trip expenditures by segment

Visitor spending choices vary widely

- Mature visitors spend nearly equal amounts for *transportation, food, gaming, and lodging*
- In contrast to prior waves, African-Americans spend more in CY 2011 than Hispanics – with much of it allocated to *shopping* (\$208 vs. \$33 by Hispanics and \$73 for average visitors).



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other.
Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)



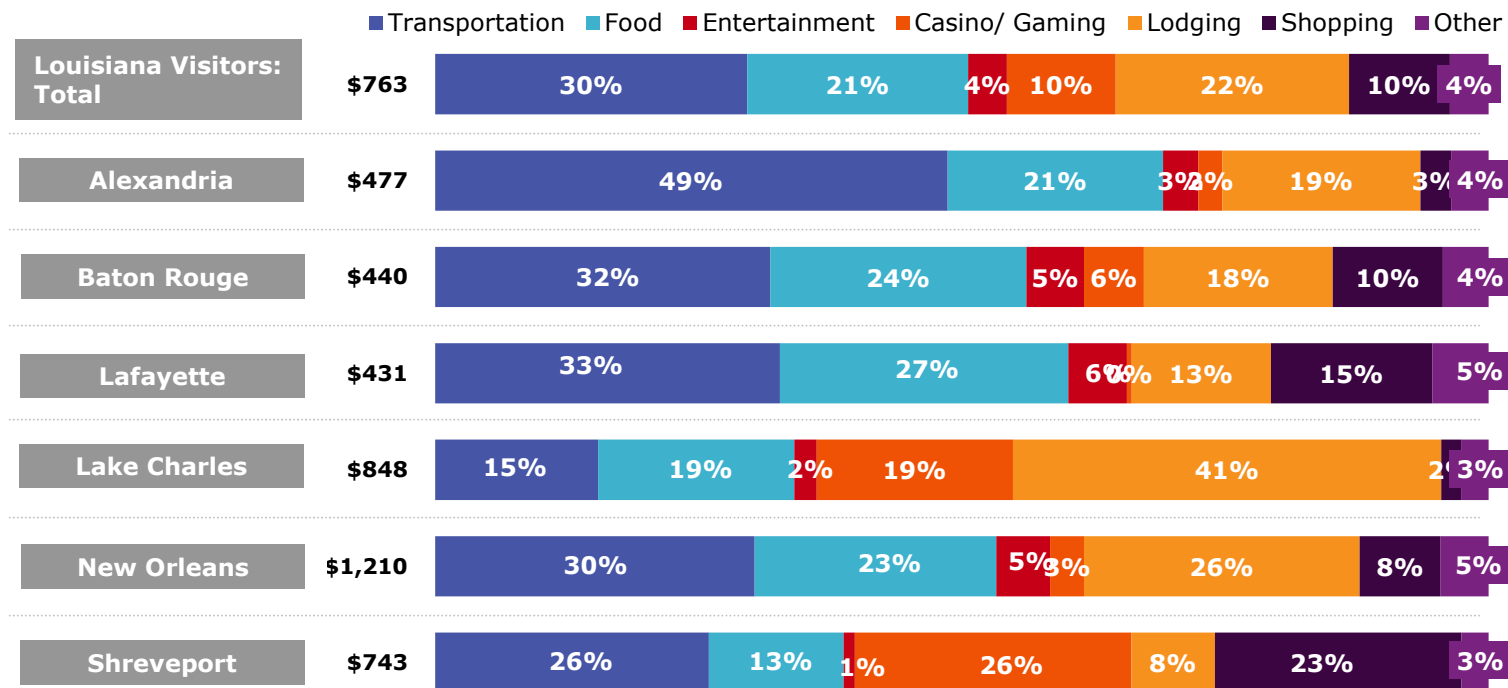
Trip expenditures by destination

New Orleans visitors spend more than others

- New Orleans visitors, who come from farther away and stay longer than average, spend the most
- Very similar to last year, spending by visitors going to other areas hovers between \$400 and \$500; however, guests in Lake Charles and Shreveport spend notably more and both show large allocations for gaming.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other. Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)



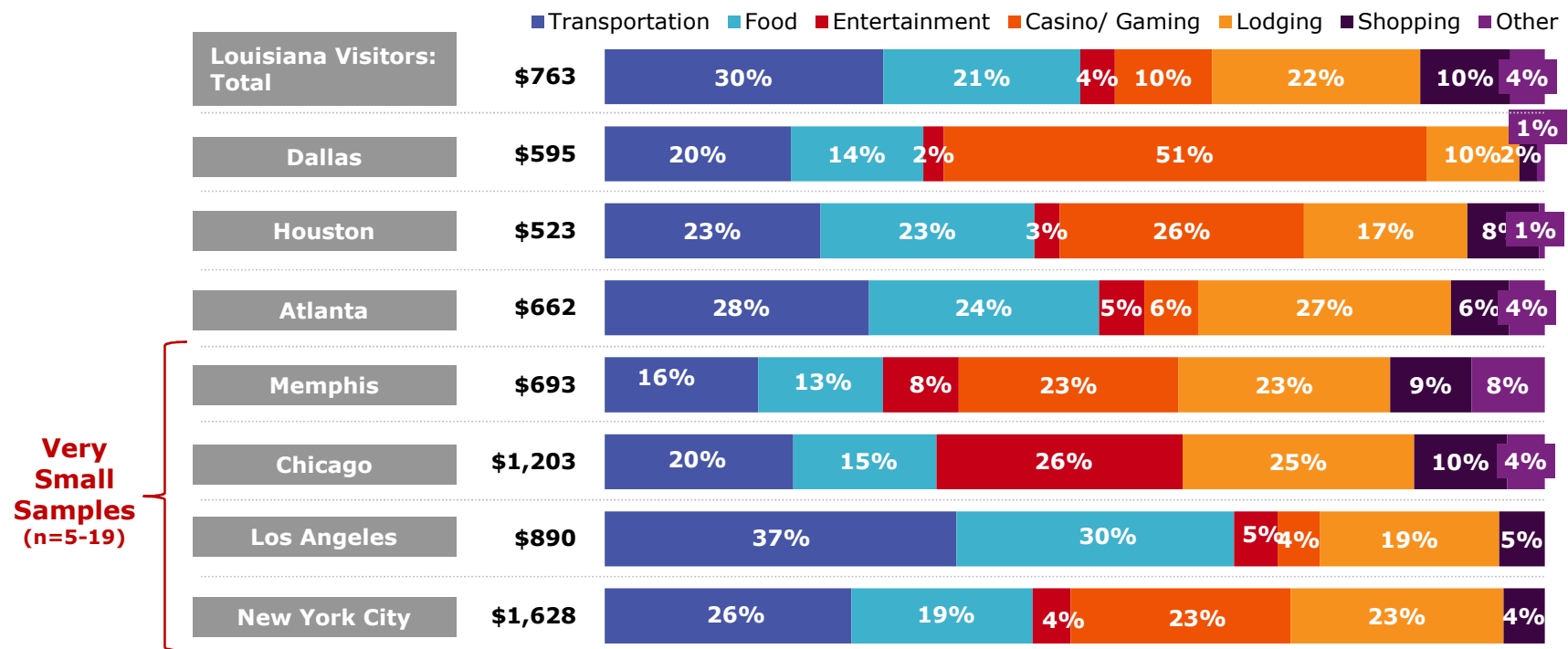
Trip expenditures by source

Visitors from the three biggest cities spend more than others

- Those from Dallas, and secondarily, Houston, spend a far larger share on gaming than other visitors
- Visitors from Houston, Atlanta, and Los Angeles seem to more heavily focus on Louisiana's *food*; those from Chicago appreciate the *entertainment*.

Average Spending in Louisiana by Destination

Total Spending by Travel Party (Total Spending, including 0)



Note: Transportation includes parking/tolls/gasoline. Food includes food/beverage/dining/groceries. Other includes amenities/other. Q4g. Please indicate the total dollar amount spent by your travel party (all) in Louisiana for . . . (State Level-demo wtd)

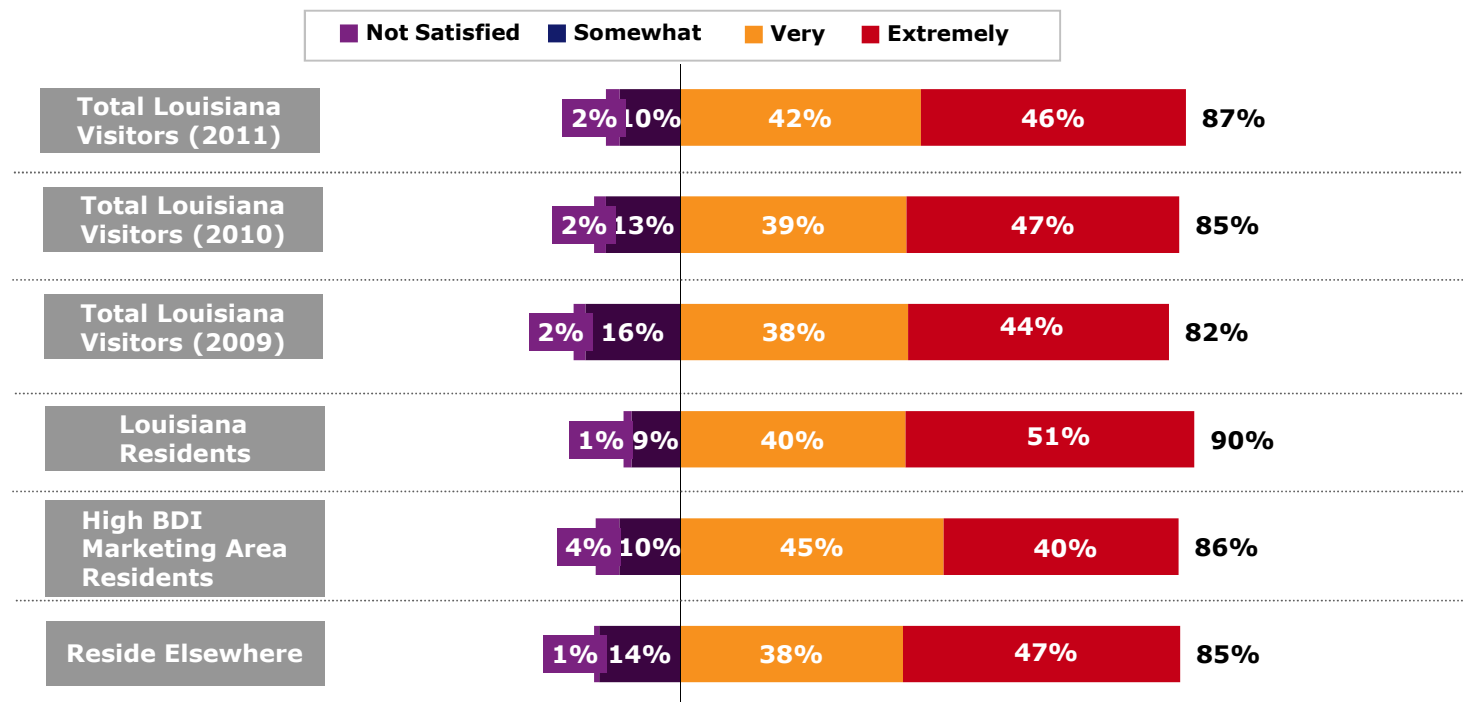


Satisfaction with Louisiana by residence

Satisfaction is strong regardless of residence

- Top box (extremely satisfied) endorsements often correlate with proximity, and not surprisingly Louisiana residents provide the most favorable ratings of their home state
- More than 8 in 10 visitors from both the High BDI marketing area and “elsewhere” also praise their trip
- Very few complain about Louisiana as a destination and satisfaction (very/extremely) climbs over time.

Satisfaction with Louisiana Visit By Residence



*Note: Not Satisfied includes Not At All and Not Very Satisfied

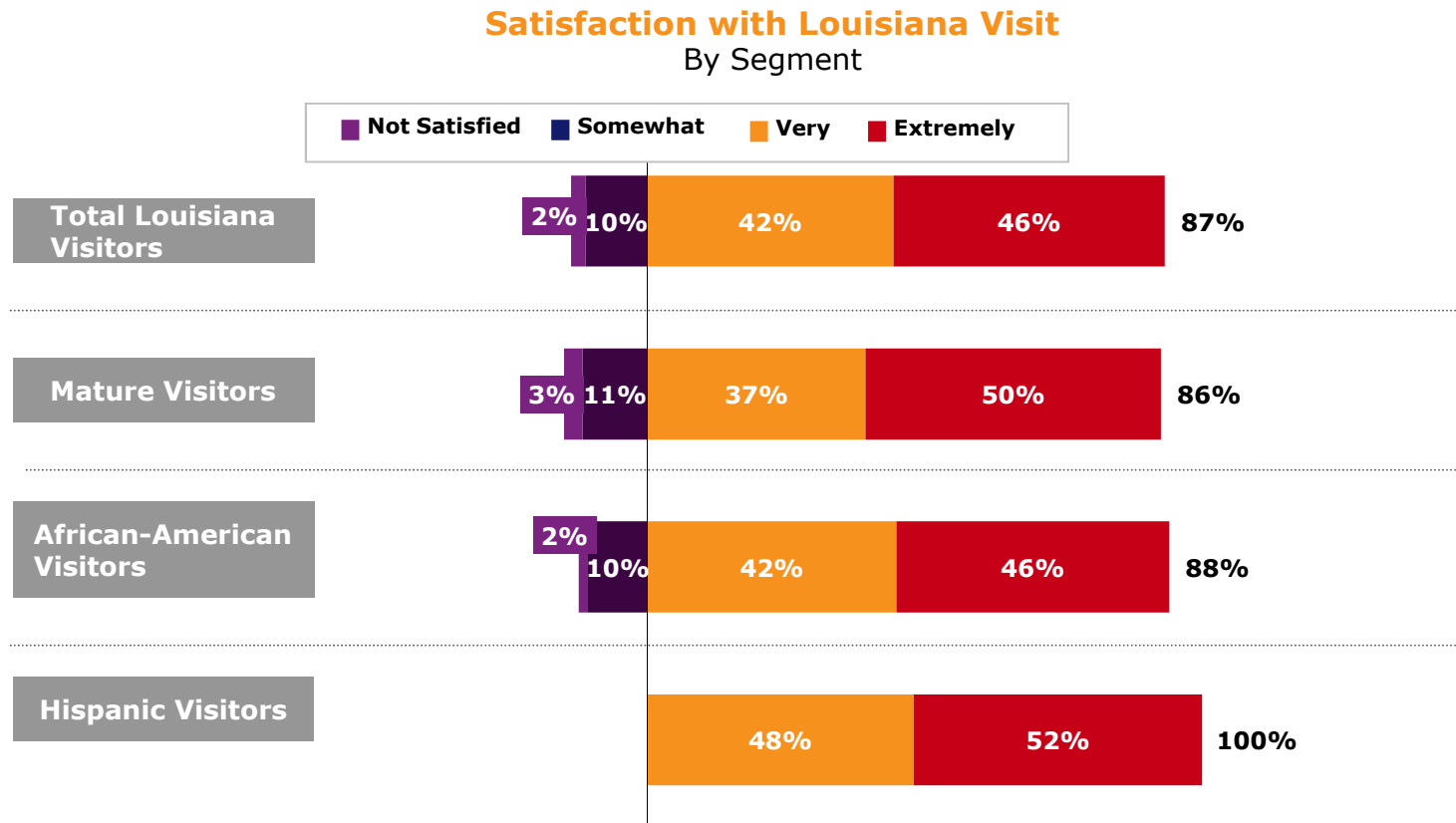
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)



Satisfaction with Louisiana by segment

Satisfaction is also quite strong across key segments

- Satisfaction among Mature and African-America visitors nearly match Total Louisiana visitors; meanwhile no Hispanic finds fault with Louisiana
- Very few (2% - 3%) visitors indicate displeasure.



*Note: Not Satisfied includes Not At All and Not Very Satisfied

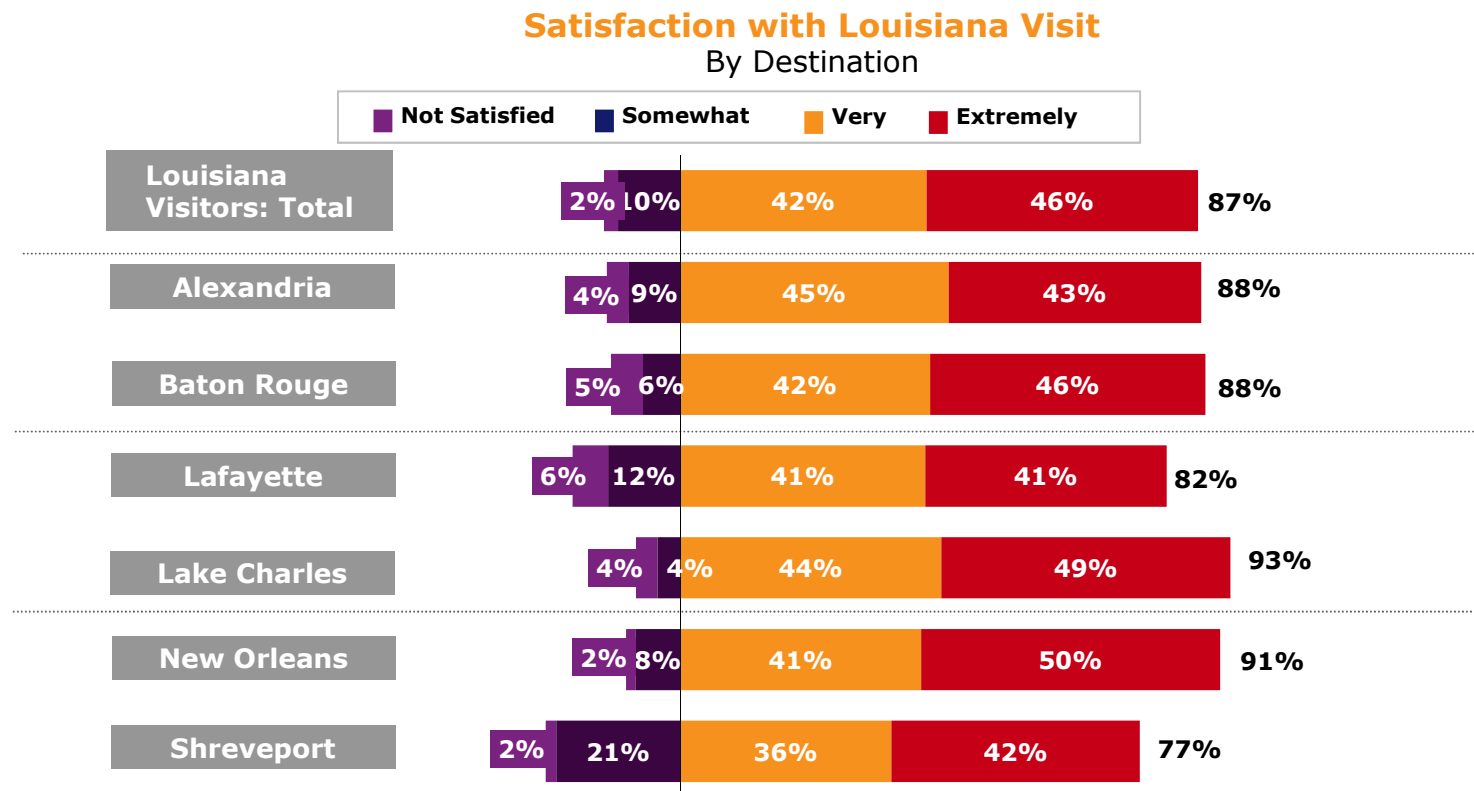
Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)



Satisfaction with Louisiana by destination

Satisfaction varies somewhat by destination

- New Orleans and Lake Charles visitors seem to go home slightly happier than visitors elsewhere in Louisiana
- Shreveport hosts fewer extremely/very satisfied visitors (perhaps gaming losses?)
- Lafayette also receives generally more modest praise.



*Note: Not Satisfied includes Not At All and Not Very Satisfied

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)



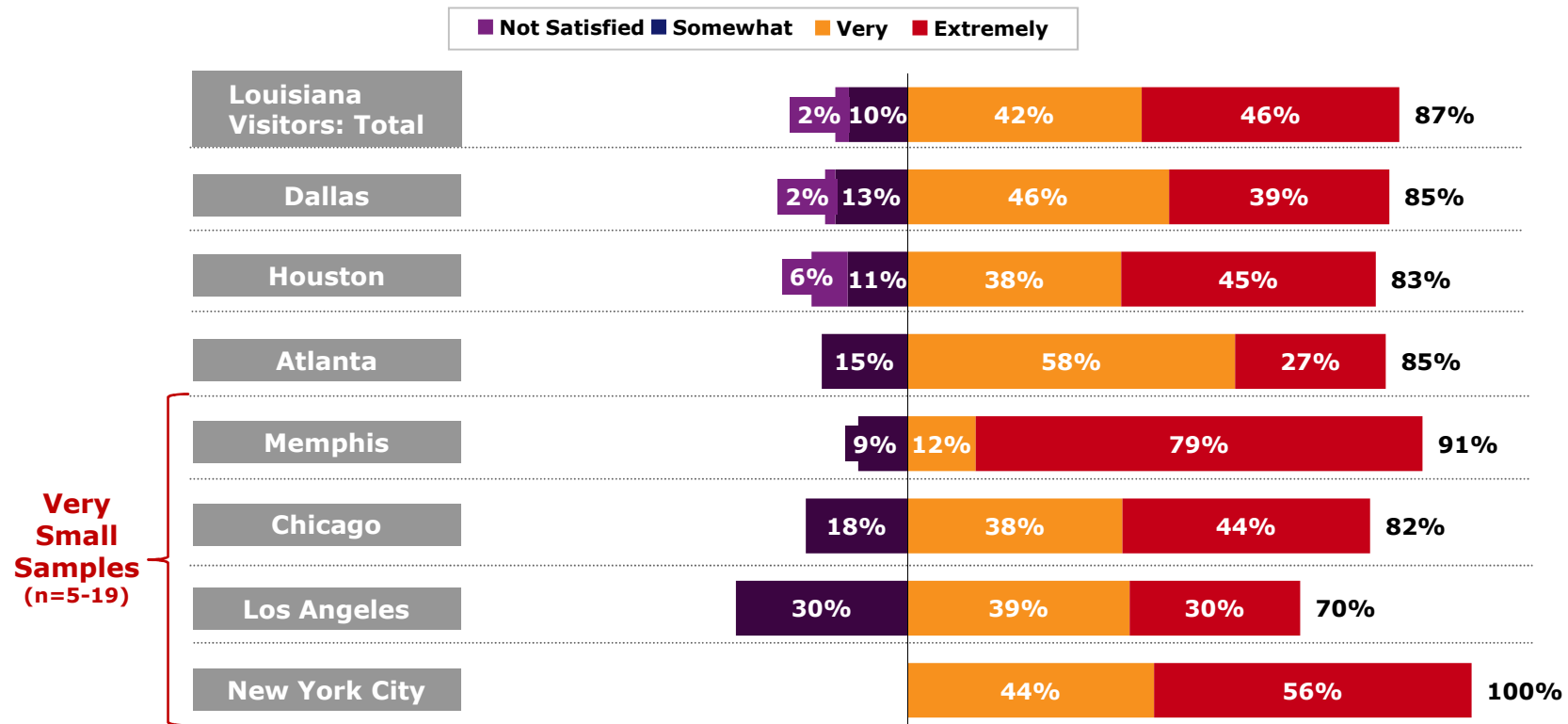
Satisfaction with Louisiana by source

Satisfaction varies somewhat by source

- Generally, more than four out of five visitors highly praise Louisiana
- New York City visitors universally hail the state
- Although improved from last wave when only half noted high satisfaction, several of those from Los Angeles still appear last enthusiastic.

Satisfaction with Louisiana Visit

By Destination



*Note: Not Satisfied includes Not At All and Not Very Satisfied

Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with Louisiana. (State Level-demo wtd.)



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Competitive States

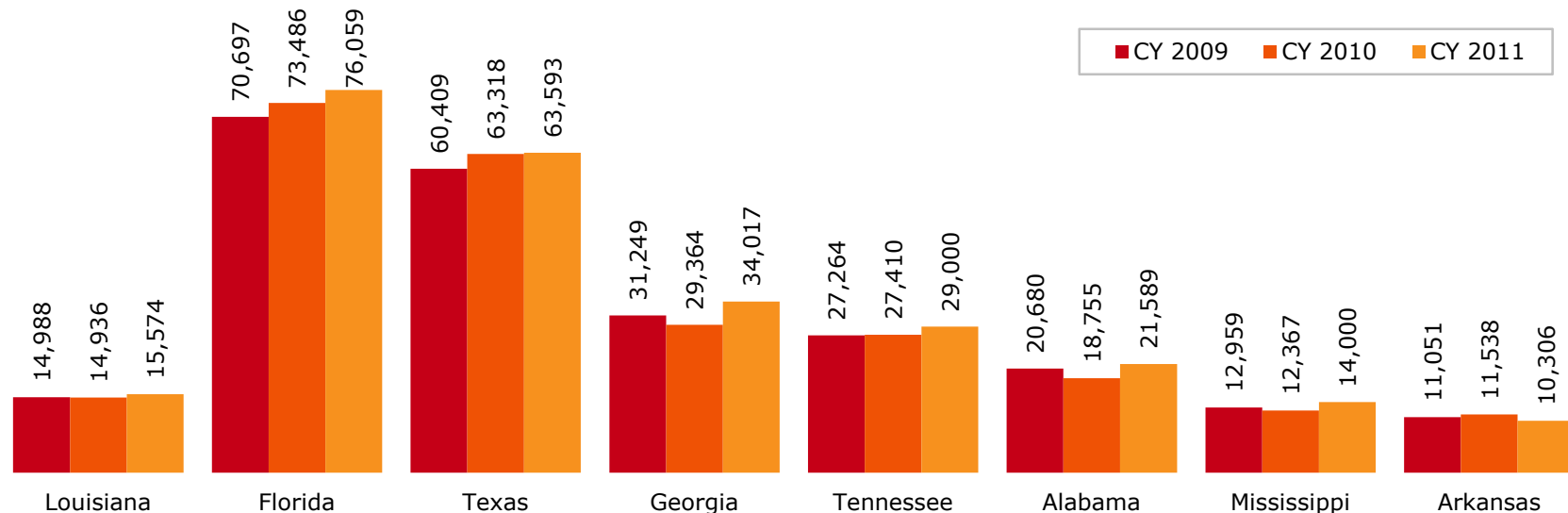


Competitive states' visitor volumes

Among eight key competitors, Louisiana ranks sixth

- Florida and Texas draw the largest share of visitors, although Texas is the least dependent on out-of-state visitation of all states
- Louisiana draws a relatively high proportion of visitors from out-of-state – most similar to Tennessee.

Visitors (Person-Trips) to Louisiana and Competitive States
(Volume in 000)



% (Households) from Out-of-State

CY 2011	68%	55%	30%	64%	69%	63%	73%	65%
CY 2010	64%	56%	31%	65%	72%	61%	62%	71%
CY 2009	65%	59%	33%	64%	71%	67%	63%	74%

Q4a. Please indicate the US state(s) visited (Person Trips-projected) (day or overnight trip)

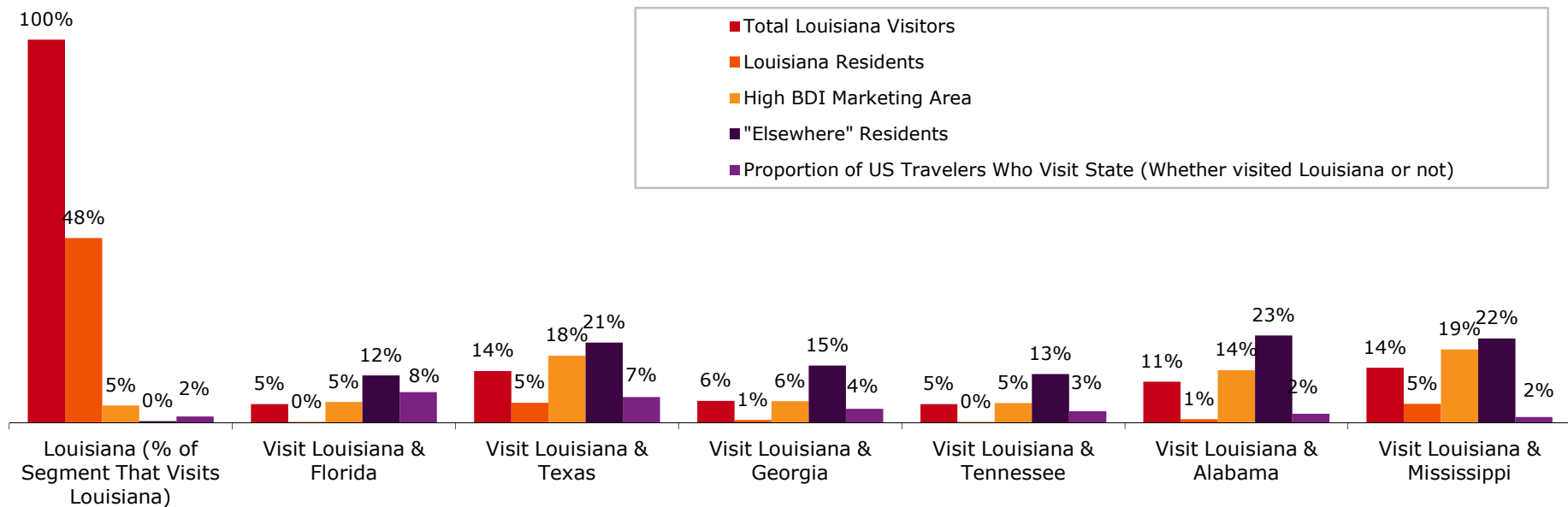


Key competitors to Louisiana (among Louisiana visitors)

Louisiana primarily shares visitors with TX, AL, and MS

- Among the total US market of all travelers, Florida (8%) and Texas (7%) draw the largest share of visitors among these key states. Tennessee, Georgia, Louisiana, Alabama, and Mississippi attract far fewer US visitors (2%-4%).
- Texas, Alabama, and Mississippi most often entice Louisiana visitors to also stop in their state, whether they live in Louisiana (less striking for Alabama visitors), the High BDI Marketing Area, or Elsewhere; or conversely, Louisiana most successfully lures visitors to those states to add time in Louisiana as well.

Proportion of Louisiana Visitors Also Visiting Competitive States (5%+) (Past month, whether on same trip or not)



Q4a. Please indicate the US state(s) visited (Projected Person Trips)



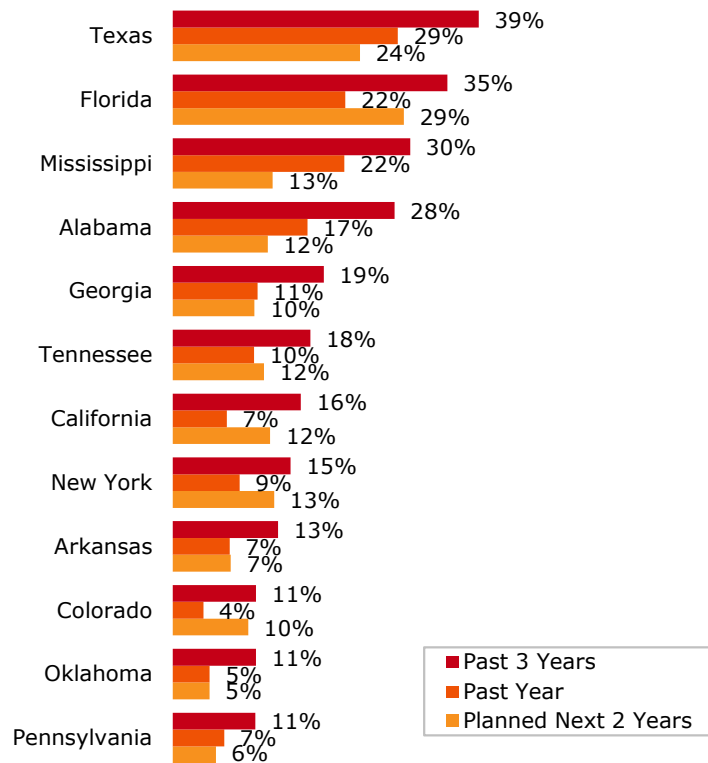
Competitive state and city destinations

Southern states and large cities compete with Louisiana

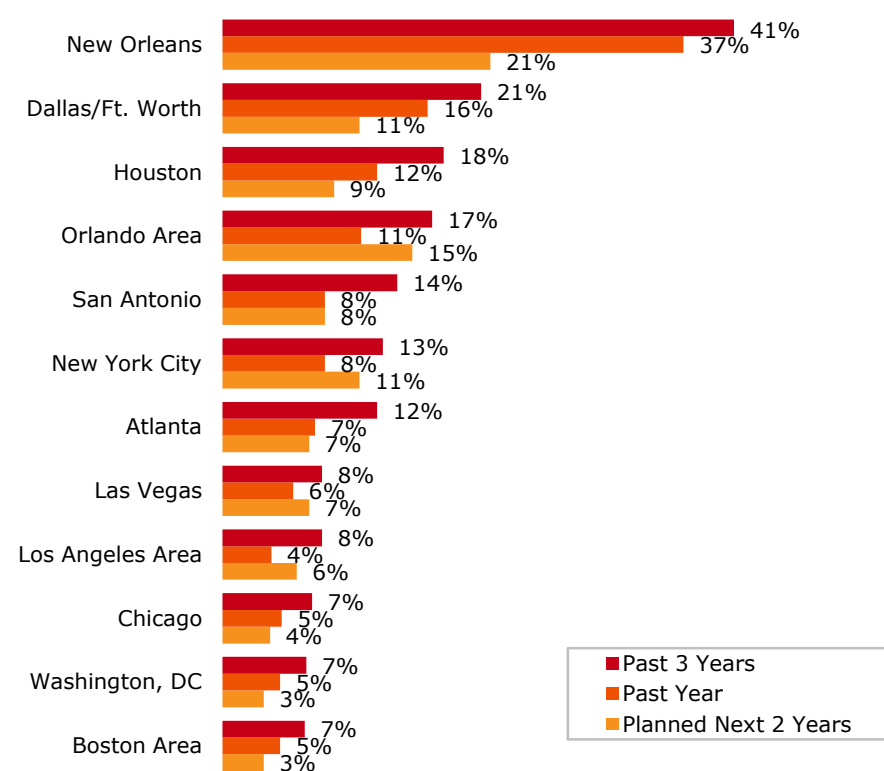
Other Areas Visited by Louisiana Visitors (Key Competitors)

% Visiting State/DMA Past Three Years (Ranking), Past Year, Planned Next Two Years

Top States
Base: Visited Louisiana (Household Level)



Top Cities
Base: Visited Louisiana (Household Level)



Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months. Q7c: Which US states plan to visit within the next two years for leisure? Repeated for cities in Q8 series. (Household Level)



Another key competitor view (visited Louisiana or not)

Geography impacts destination choices

As noted in other TNS reports, geography plays a key role in destination selection – the states most likely visited/planned to visit vary by travelers' residence:

- **Louisiana residents** visit close to home, with Louisiana topping the list of eight competitive destinations for past visits (both the 3-year and 1-year time periods). They select Texas and Mississippi as the leading competitors. For future travel, *Florida* and *Texas* generate the greatest interest
- If travelers **live in the High BDI Marketing Area**, Texas and Florida consistently take the lead.
- Those living **elsewhere (neither the High BDI Marketing Area nor Louisiana)** seldom (5% in past 3 years) choose to visit *Louisiana*, usually opting for *Florida* or *California*.

Visitation (Households) by Residence Over Time

Competitive Set: AL, AR, FL, GA, LA, MS, TN, TX	Visited Past 3 Years	Visited Past Year	Plan to Visit Next 2 Years
RESIDE IN LOUISIANA			
Visit Louisiana	52%	46%	25%
Strongest Competitor (of the set)	48 (TX)	31 (MS)	34 (FL)
Second-Strongest Competitor	42 (MS)	30 (TX)	28 (TX)
Third-Strongest Competitor	36 (FL)	20 (FL)	22 (MS)
RESIDE IN HIGH BDI MKTG AREA			
Visit Louisiana	19%	12%	12%
Strongest Competitor	35 (FL)	26 (TX)	31 (FL)
Second-Strongest Competitor	32 (TX)	22 (FL)	20 (TX)
Third-Strongest Competitor	24 (GA)	16 (GA)	14 (CA/GA) Tie
RESIDE ELSEWHERE			
Visit Louisiana	5%	2%	4%
Strongest Competitor	29 (FL)	17 (FL)	24 (FL)
Second-Strongest Competitor	24 (CA)	16 (CA)	20 (CA)
Third-Strongest Competitor	19 (NY)	12 (NY)	15 (NY)

Q7a: Please indicate US states visited for leisure in past three years. Q7b: Please indicate states visited within the past 12 months. Q7c: Which US states plan to visit within the next two years for leisure? (Household Level)



Competitive spending: Louisiana vs. nearby states

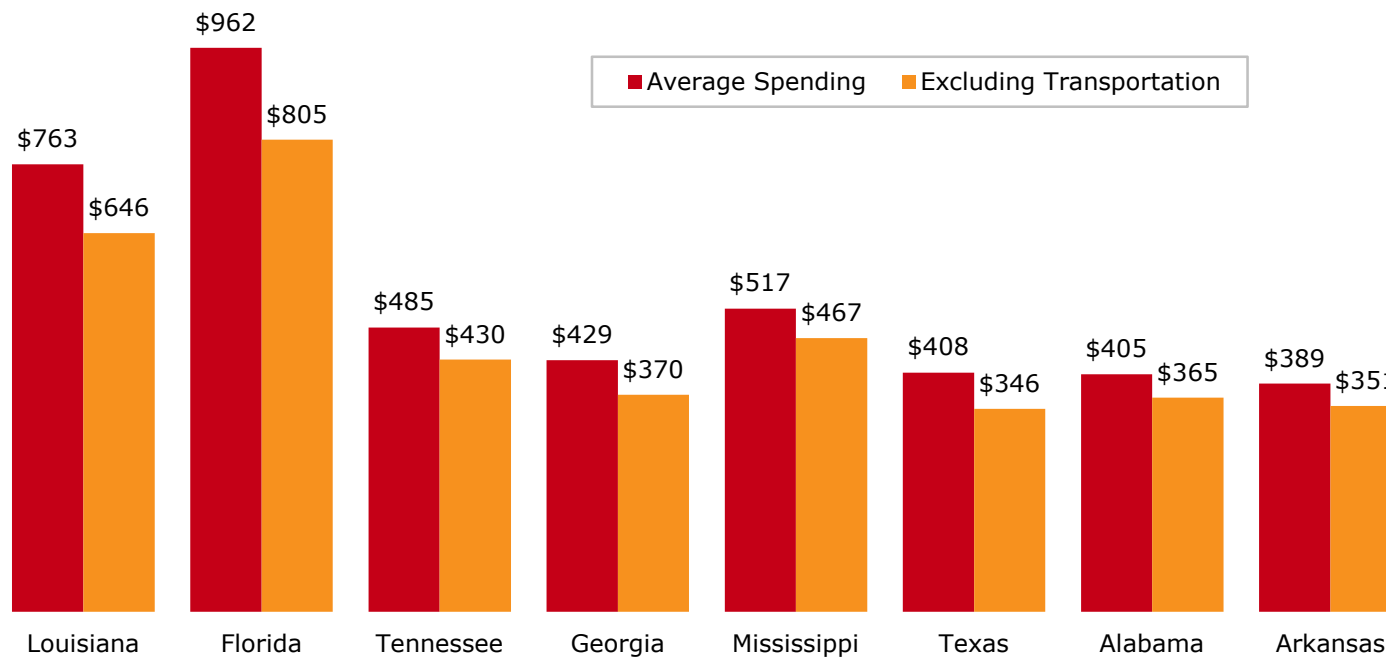
Trip spending usually hovers near \$400-\$500

Still, spending varies by destination:

- Florida continues to be the one exception, where (\$962) trip spending nearly doubles nearby states, but transportation accounts for a larger proportion than for other states
- Louisiana (\$763) claims second-place.

Average Annual Spending (Q4g): Louisiana vs. Nearby States

Total Spending (Business/Leisure/Day/Overnight) by Travel Party (Total Spending, including 0)



Q4g. Please indicate the total dollar amount spent by your travel party (all) . . . (State Level – demo wtd)



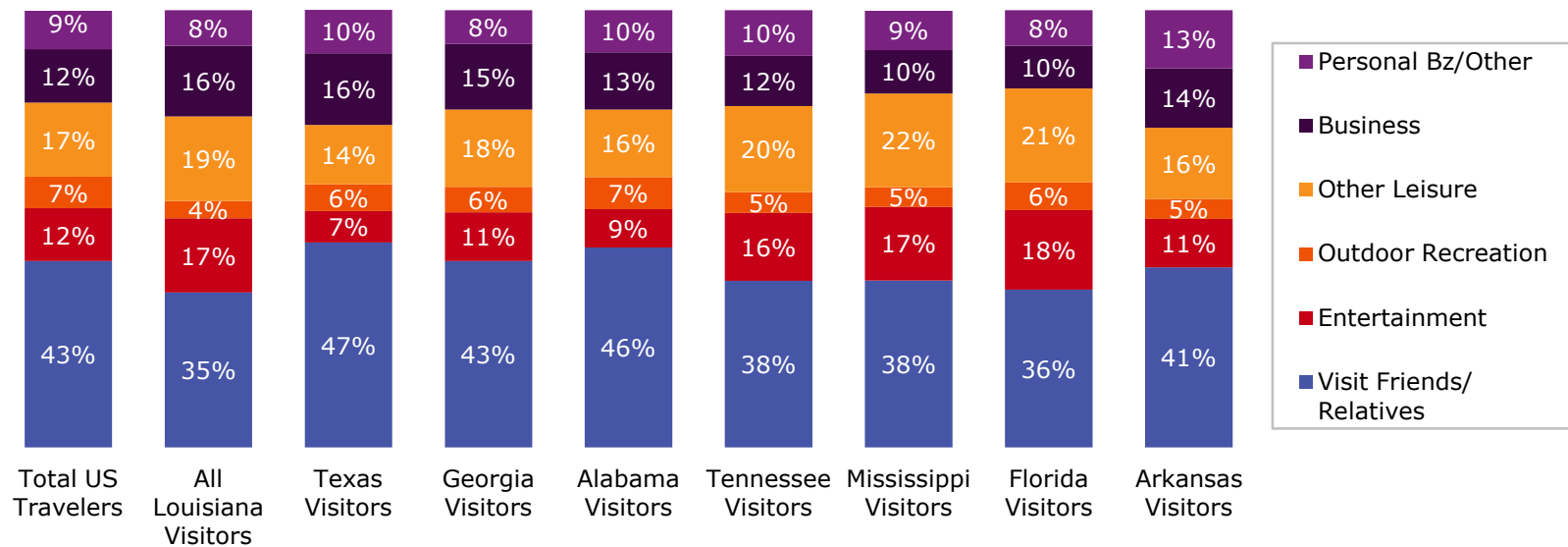
Competitive states - trip purpose

Reasons for travel vary minimally by state; leisure dominates

Further, visits to friends and relatives motivate most trips. Other observations include:

- Louisiana (16%), Texas (16%), and Georgia (15%) lead on business travel
- Entertainment attracts a larger proportion of visitors to Mississippi (gaming) and Florida (Orlando) than other states; Louisiana (17%) places above average.

Primary Purpose of Trip



Q1b. Which of the following was the primary purpose of your trip. . . (State Level – demo wtd)

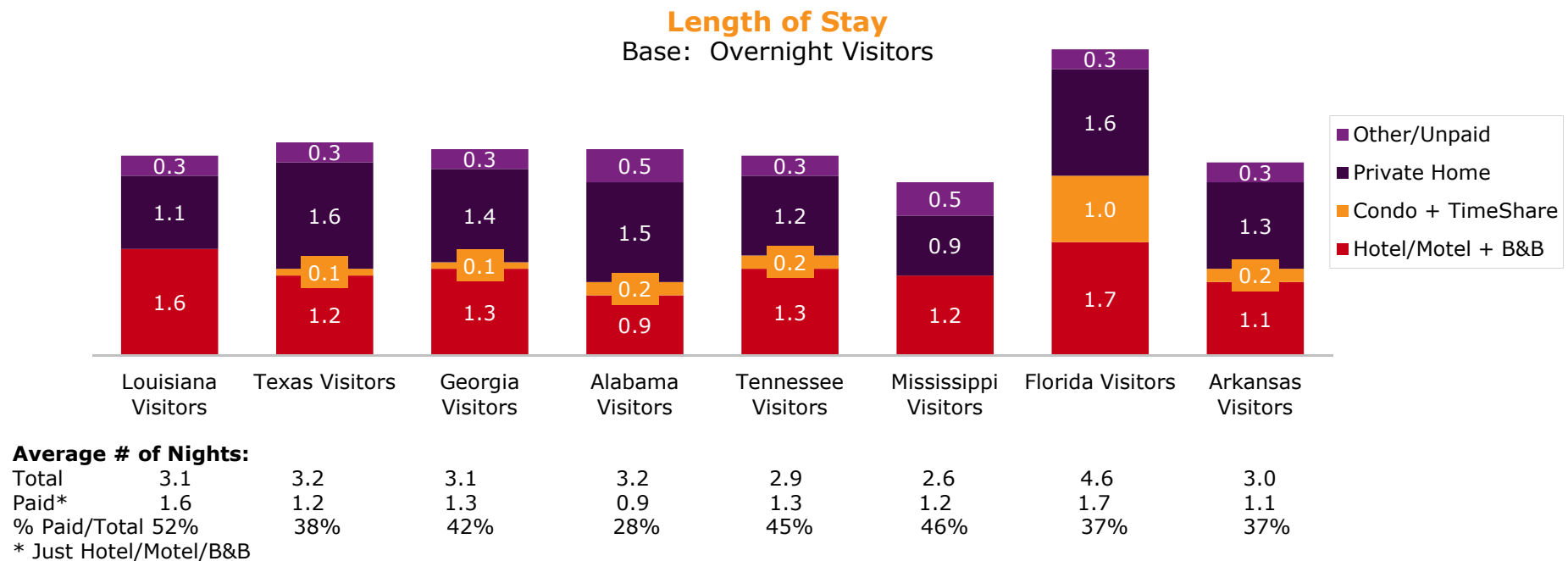


Competitive states: accommodations and length of stay

A third or more stay in hotels/motels/B&Bs

Length of trip varies by destination:

- Florida visitors tend to stay the longest (4.6 nights) and thus lead on the number of nights in a hotel/motel or B&B (1.7) and ties Texas for the lead in private homes (1.6); it is also the only market with a notable level of condo/timeshare stays (1.0)
- Louisiana places near average for total nights stayed but, more positively, hosts a higher percentage of those choosing paid hotel/motel/B&B accommodations.



Q4f. Abridged: Of the overnights in ..., specify the number stayed at each accommodation (State Level)



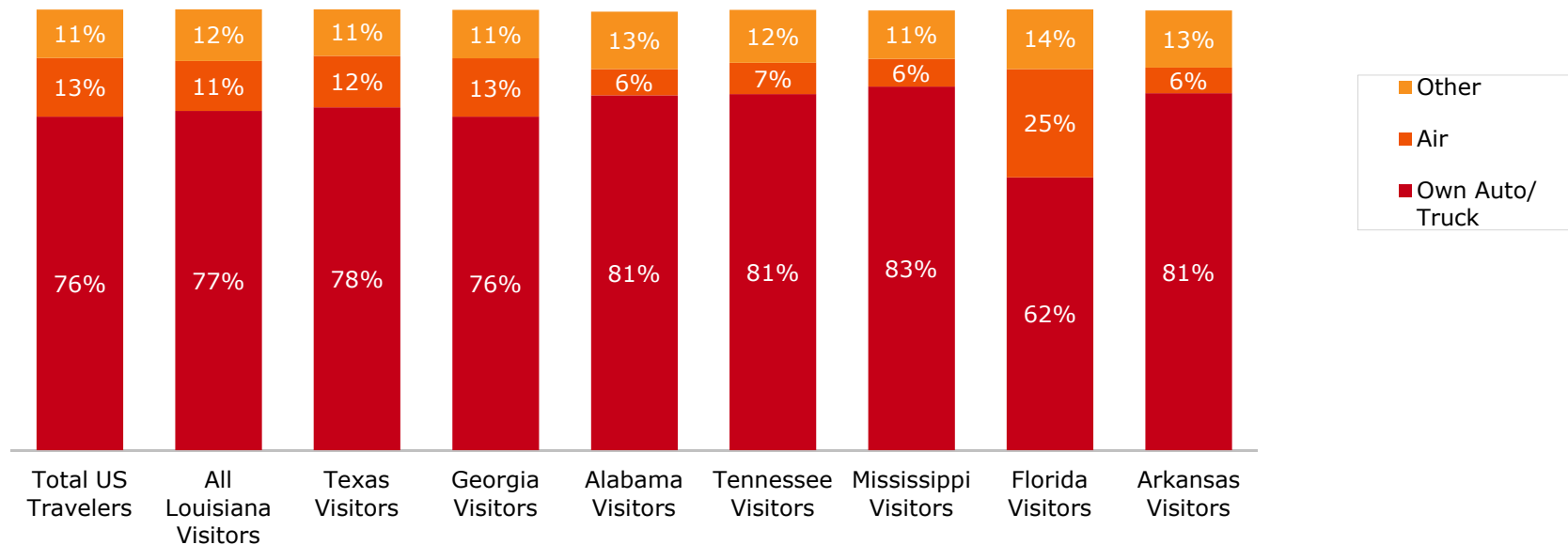
Competitive states: primary mode of transportation

Most travelers drive to their destination

Visitors to Louisiana (77%) and competitor states usually drive – similar to total US travelers:

- Florida visitors far more often (25% vs. 13% nationally) choose to fly than those traveling elsewhere
- Mississippi (83%), Alabama (81%), Arkansas (81%), and Tennessee (81%) visitors rely slightly more heavily on their cars.

Primary Mode of Transportation of Louisiana Visitors



Q2b. Abridged: Which was the primary mode of transportation used for your trip . . . (Household Level – demo wtd)



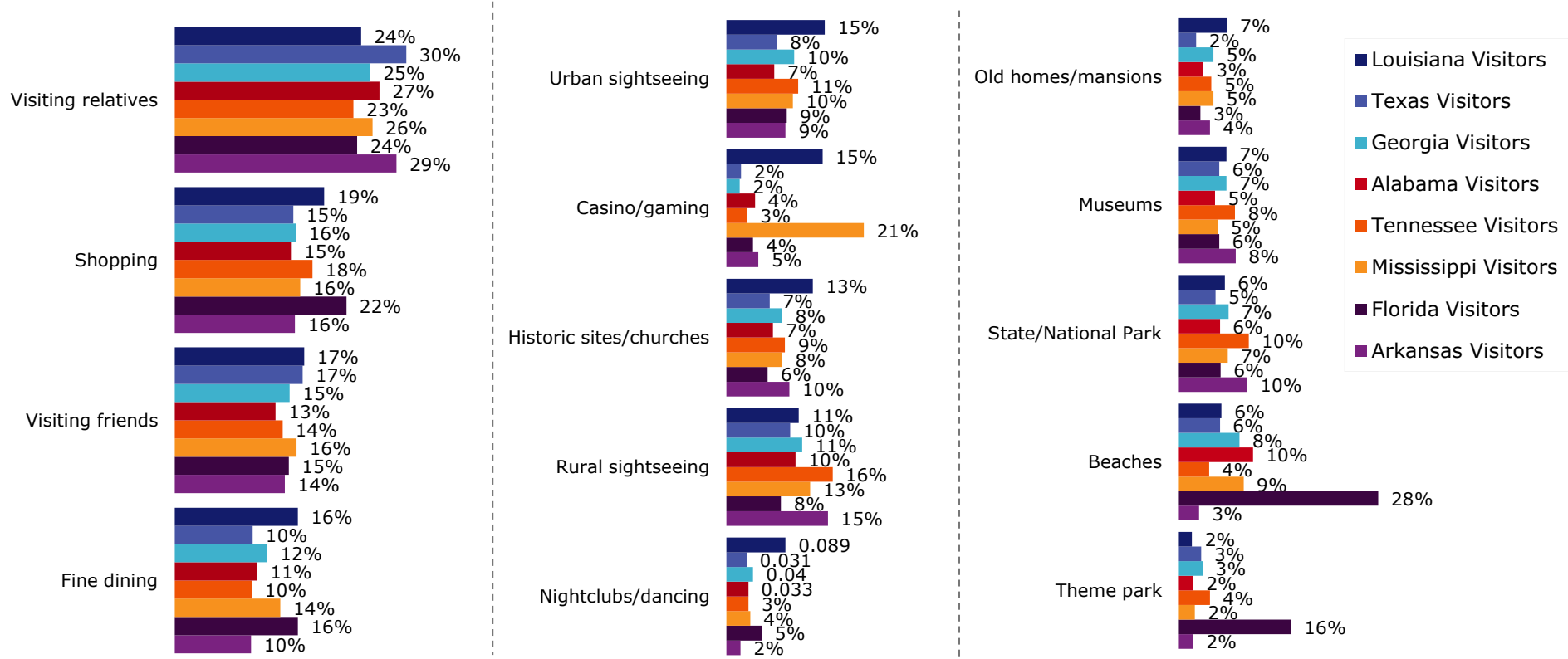
Competitive states: top 10 vacation activities

Top vacation activities/attractions vary substantially by state

Louisiana tops other destinations for *nightclubs/dancing*, *urban sightseeing*, *historic sites/churches*, and ties Florida for *fine dining*. Other destination "ownership" includes: Florida for *theme parks* and *beaches*, Tennessee and Arkansas for *rural sightseeing*, and Mississippi for *gaming*.

Activities Participated/Attractions Visited

% Participated/Visited – Ranked by Louisiana Visitors (Top 12 Activities plus Theme Parks)



Q4h. When you visited (state) during trip/month, please check all of the following activities did/attractions visited. (State Level-demo wtd)

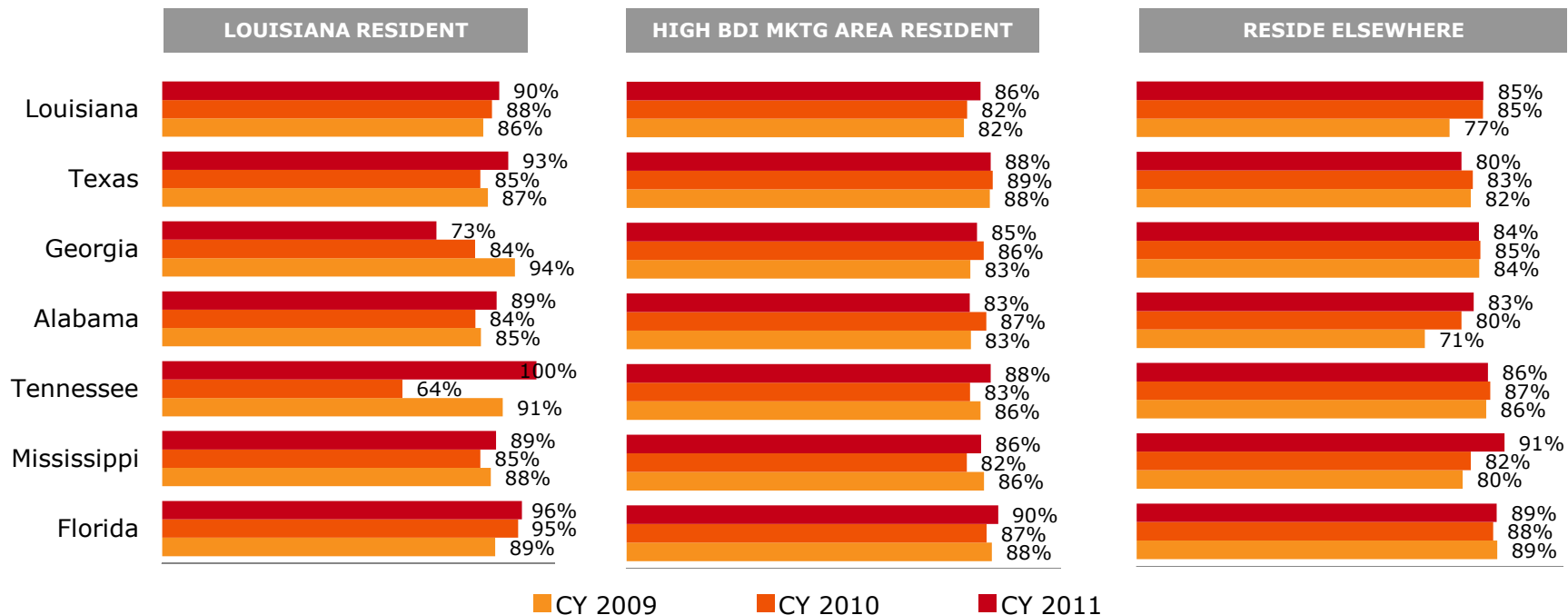


Competitive states: satisfaction

Louisiana satisfies visitors, but lags several competitors

- **In-state residents** praise Louisiana, but Tennessee, Florida, and Texas lead
- All competitors perform well **within the High BDI Marketing Area** (between 83% and 90%)
- Among those **outside the state and the High BDI Marketing Area**, Louisiana places in the center
- Louisiana 's scores gain slightly among in-state and High BDI Marketing Area residents, and matches last year among the most distant visitors.

Extremely/Very Satisfied With Trip to Region Visited (Far Left)



Q4I: Using a scale of 1-5 (5=extremely satisfied), please indicate satisfaction with (area indicated at far left). (State Level – demo wtd.)



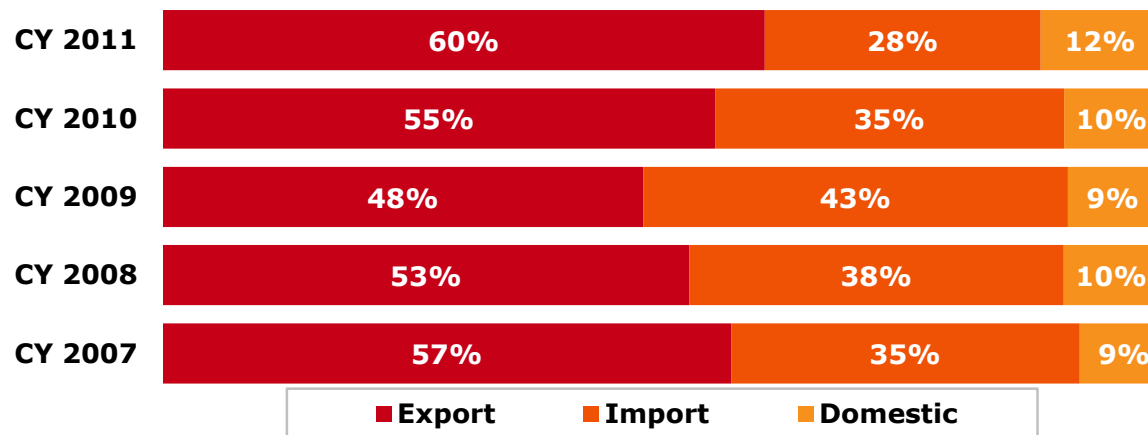
6

Export ~ Import



Export/Import “Balance of Trade”

- Louisiana increases its surplus “balance of trade” for tourism in CY 2011
- One in eight (12%) tourism dollars remain in Louisiana as domestic Louisiana spending
- Spending that occurs outside the state by non-residents are not included in the chart.



Export represents \$ coming into Louisiana (Non-LA residents coming to LA)

Import represents \$ leaving Louisiana (LA residents traveling elsewhere)

Domestic represents \$ staying in Louisiana (LA residents spending within LA)

Q4g. Please indicate the total dollar amount spent by your travel party (all) . . . (State Level – proj.)



7

Segment/Destination Profiles



Mature visitor profile

Market relevance

The proportion of Louisiana's visitors that are 55 or older (31%) nearly matches the US as a whole (33%). Comparisons below = (Mature Louisiana visitors vs. Total Louisiana visitors)

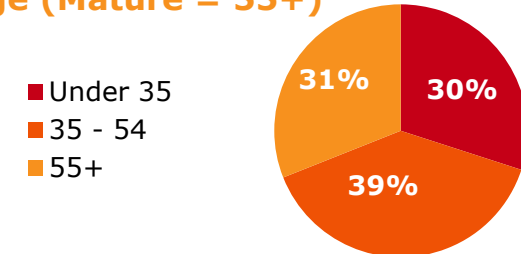
Demographic Profile:

- Age: By definition, this group is older (64 vs. 45)
- Income: Somewhat higher incomes (\$78,400 vs. \$68,900)
- Married: Somewhat more than average (64% vs. 56%)
- Household composition: Usually live with one other person (55% vs. 33%) and seldom with children (10% vs. 34%)
- Ethnicity: Much more likely Caucasian (92% vs. 81%); less likely African American (6% vs. 14%)
- Residence: Less likely to be a Louisiana resident (28% vs. 32%)
- Employment: Very likely to be retired (47% vs. 16%), as expected for this age group.

Trip Profile:

- Purpose: Very similar to total Louisiana visitors– about as likely to *visit friends/relatives* (34% vs. 35%) and to come for *entertainment/ sightseeing* (19% vs. 17%)
- Length of stay: About as likely to spend the night (65% vs. 69%) and for about the same length of time when they do (3.0 vs. 3.1 nights); they opt for paid (hotels/motels) lodging slightly more often (57% vs. 52%)
- Travel party: Often travel in pairs (52% vs. 40%), usually with another household member (51% vs. 37%)
- Mode: Typically drive their own car (81% vs. 77%)
- Planning horizon: Similarly likely to make a last minute trip (41% vs. 43% decide within 2 weeks of trip)
- Activity choices: More often *gamble* (21% vs. 15%)
- Spending: More overall (\$1,002 vs. \$763) and more on gaming (\$202 vs. \$79), consistent with activities
- Satisfaction with Louisiana: Similarly pleased with Louisiana (86% vs. 87% extremely/very satisfied).

By Age (Mature = 55+)



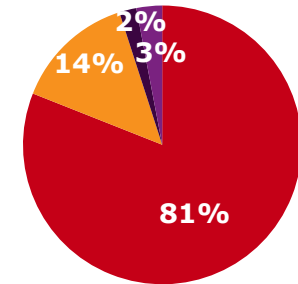
African-American visitor profile

Market relevance

About one in seven (14%) Louisiana visitors claim African-American heritage, over twice that of US travelers overall (6%).
Comparisons below = (African-Americans vs. Total Louisiana visitors)

Ethnicity

- White
- African-American
- Hispanic
- Other



Demographic Profile:

- Age: Much younger than average (39 vs. 45) with more than two in five under 35 (44% vs. 30%)
- Income: Lowest of segments reviewed (\$53,400 vs. \$68,900), except in-state visitors (\$52,700)
- Married: Least likely married (27% vs. 56%), which contributes to lower incomes
- Household composition: Most likely to live with children (44% vs. 34%) or alone (34% vs. 22%)
- Residence: About average likelihood to live in-state (30% vs. 32%)
- Employment: Average employed full-time (59% vs. 61%) but, since younger, fewer retirees (8% vs. 16%).

Trip Profile:

- Purpose: Most likely of segments to *visit friends/relatives* (42% vs. 35%)
- Length of stay: Just as likely to spend the night (69% vs. 69%), they stay slightly fewer nights (2.8 vs. 3.1 nights); they also swap hotel accommodations (46% vs. 52%) for private homes (46% vs. 35%)
- Travel party: More likely to travel alone (54% vs. 44%) than others
- Mode: Usually drive (68% vs. 77%), but often rent a car (15% vs. 5%) or catch a bus (4% vs. 1%)
- Planning horizon: Slightly more spontaneous (48% vs. 43% decide to visit LA within two weeks of trip)
- Activity choices: African-Americans more often *visit relatives* (29% vs. 24%) or *friends* (25% vs. 17%), consistent with lodging, and more often opt for *nightclubs/dancing* (14% vs. 9%, consistent with age)
- Spending: Spend somewhat more than average (\$950 vs. \$763)
- Satisfaction with Louisiana: Relatively satisfied with Louisiana, similar to all visitors (88% vs. 87%).



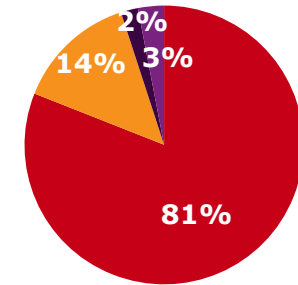
Hispanic visitor profile

Market relevance

The smallest segment reviewed, only one in about 50 Louisiana visitors (2%) claim Hispanic heritage, less than the level of US travelers overall (4%). Comparisons below = (Hispanics vs. Total Louisiana visitors)

Ethnicity

- White
- African-American
- Hispanic
- Other



Demographic Profile:

- Age: Much younger than average Louisiana visitors (39 vs. 45) with half under 35 (49% vs. 30%)
- Income: Somewhat below average (\$59,500 vs. \$68,900)
- Married: Somewhat less likely married (44% vs. 56%)
- Household composition: Slightly less often live with children (29% vs. 34%); otherwise, near average
- Residence: Less likely to live in-state (21% vs. 32%)
- Employment: More work full-time (71% vs. 61%) and, since younger, fewer are retired (8% vs. 16%).

Trip Profile:

- Purpose: See *friends/relatives* less than average (31% vs. 35%); more seek *entertainment/recreation* (34% vs. 21%); no business noted
- Length of stay: More likely to stay overnight (78% vs. 69%), but for less time (2.6 vs. 3.1 nights) and for less time in paid accommodations (35% vs. 52%) than elsewhere
- Travel party: More often travel in larger (3+) groups (31% vs. 20%) and with children (30% vs. 19%)
- Mode: Usually drive (78% vs. 77%), similar to other visitors
- Planning horizon: Not very spontaneous (14% vs. 43% decide to visit LA within two weeks of the trip)
- Activity choices: More often visit *historic sites/churches* (38% vs. 13%), *museums* (32% vs. 7%), *old homes/mansions* (17% vs. 7%), and *zoos* (15% vs. 4%) than others
- Spending: Spend less than average (\$514 vs. \$763), but more than in-state visitors (\$447)
- Satisfaction with Louisiana: All report satisfaction with Louisiana (100% vs. 87% extremely/very satisfied).



Alexandria visitor profile

Market relevance

About one Louisiana visitor in 20 (5%) stops in Alexandria.
Comparisons below = (Alexandria vs. Total Louisiana visitors)

Demographic Profile:

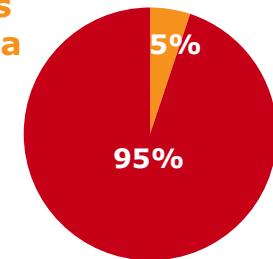
- Age: Similar to other Louisiana visitors (44 vs. 45)
- Income: Near average income (\$66,700 vs. \$68,900)
- Married: Slightly more likely married (61% vs. 56%)
- Household composition: More likely to live with children (45% vs. 34%); fewer live alone (16% vs. 22%)
- Ethnicity: Usually Caucasian (76% vs. 81%); more often African-American (21% vs. 14%)
- Employment: Near average full-time employment (64% vs. 61%); fewer retirees (10% vs. 16%)
- Residence: Over half of visitors live in-state (53% vs. 32%).

Trip Profile:

- Purpose: More likely to come for *business* (27% vs. 16%) or for *personal business* (14% vs. 8%)
- Length of stay: Often spend the night (72 vs. 69%) for a longer average stay (4.7 vs. 3.1 nights); includes greater use of hotels/motels for lodging (74% vs. 52%) that is probably influenced by more business travel
- Travel party: More likely to travel in a larger (3+) group (31% vs. 20%) and with children (24% vs. 19%)
- Mode: Drive their own car somewhat more often than the average Louisiana visitor (88% vs. 77%)
- Planning horizon: Above average spontaneity (56% vs. 43% decide to visit within 2 weeks of trip)
- Activity choices: Far more often come to visit relatives (30% vs. 28%) than any other activity; visiting friends (14%) ranks second
- Spending: Alexandria visitors spend below average (\$477 vs. \$763), but more than visitors to other cities that rely heavily on in-state visitation (Baton Rouge at \$440 and Lafayette at \$431)
- Satisfaction with Louisiana: Highly satisfied, these visitors mirror the average Louisiana visitor (88% vs. 87%).

% of Louisiana Visitors
Who Went to Alexandria

■ Alexandria
■ Non-Alexandria



Baton Rouge visitor profile

Market relevance

About one Louisiana visitor in seven (14%) stops in Baton Rouge.
Comparisons below = (Baton Rouge vs. Total Louisiana visitors)

Demographic Profile:

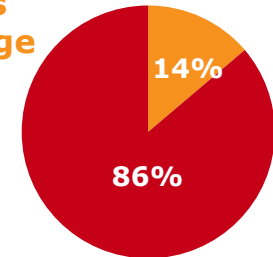
- Age: Somewhat younger (40 vs. 45)
- Income: Below average affluence (\$49,900 vs. \$68,900)
- Married: Less likely to be married (45% vs. 56%)
- Household composition: Among the least likely to live in a two-person household (18% vs. 33%) and notably more likely to live alone (30% vs. 22%)
- Ethnicity: Less likely Caucasian (63% vs. 81%); twice as likely African-American (29% vs. 14%)
- Employment: Near average full-time employment (59% vs. 61%); fewer retirees (10% vs. 16%)
- Residence: About half of visitors live in-state (51% vs. 32%).

Trip Profile:

- Purpose: More likely to *visit friends/relatives* (46% vs. 35%)
- Length of stay: About average tendency to spend the night (73% vs. 69%) for an average length of stay (3.0 vs. 3.1 nights) and average proportion of paid accommodations (47% vs. 52%)
- Travel party: More travel solo (50% vs. 44%); fewer in pairs (31% vs. 37%)
- Mode: Drive their own car slightly more often than the average Louisiana visitor (81% vs. 77%)
- Planning horizon: Above average spontaneity (50% vs. 43% decide to visit within 2 weeks of trip)
- Activity choices: They visit relatives (31% vs. 28%), shop (21% vs. 19%), or see friends (19% vs. 17%) more than any other activity and each is slightly above average
- Spending: With Baton Rouge visitors primarily living in-state and often visiting friends/relatives, they spend less than average (\$440 vs. \$763)
- Satisfaction with Louisiana: Highly satisfied, similar to all visitors (88% vs. 87%).

% of Louisiana Visitors
Who Went to Baton Rouge

■ Baton Rouge
■ Non-Baton Rouge



Lafayette visitor profile

Market relevance

About one Louisiana visitor in 14 (7%) stops in Lafayette.
Comparisons below = (Lafayette vs. Total Louisiana visitors)

Demographic Profile:

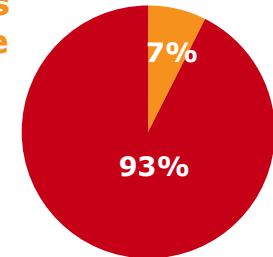
- Age: Same average age as other Louisiana visitors (45 vs. 45)
- Income: With New Orleans, highest among cities visited (\$77,800 vs. \$68,900)
- Married: About average level of marriage (68% vs. 56%)
- Household composition: Much more likely to live with children (54% vs. 34%), but also more likely to live alone (29% vs. 22%); less often live in two-person households (17% vs. 33%)
- Ethnicity: About average Caucasian (82% vs. 81%) and African-American (11% vs. 14%)
- Employment: Far more likely employed full-time (84% vs. 61%)
- Residence: Not quite half of visitors live in-state (43% vs. 32%).

Trip Profile:

- Purpose: Come more often to *visit friends/relatives* (46% vs. 35%)
- Length of stay: Typically spend the night (69% vs. 69%) for a somewhat longer stay (4.3 vs. 3.1 nights), but as likely to select hotels/motels (53% vs. 52%) as other Louisiana visitors
- Travel party: More likely to travel in a larger (3+) group (38% vs. 20%) and with children (36% vs. 19%)
- Mode: Almost always drive their own car (94% vs. 77%)
- Planning horizon: Above average spontaneity (49% vs. 43% decide to visit within 2 weeks of trip)
- Activity choices: Similar to Baton Rouge, visitors are more likely to *visit relatives* (34% vs. 28%), *shop* (31% vs. 19%), and *visit friends* (23% vs. 17%) and each of these exceeds the average LA visitor
- Spending: Lafayette visitors spend the least of these six destinations (\$431 vs. \$763); similar to Baton Rouge, they often come to visit friends/relatives and more than two in five live in-state
- Satisfaction with Louisiana: Although highly satisfied, these visitors lag the other five cities (82% vs. 87%).

% of Louisiana Visitors
Who Went to Lafayette

■ Lafayette
■ Non-Lafayette



Lake Charles visitor profile

Market relevance

About one Louisiana visitor in 13 (8%) stops in Lake Charles.
Comparisons below = (Lake Charles vs. Total Louisiana visitors)

Demographic Profile:

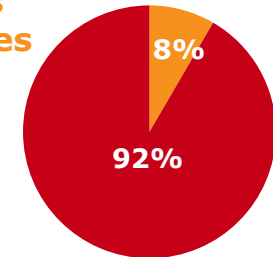
- Age: Somewhat older (47 vs. 45)
- Income: Below average income (\$61,800 vs. \$68,900)
- Married: Slightly less likely married (51% vs. 56%)
- Household composition: Among the visitors to the six Louisiana cities, Lake Charles visitors more often live alone (27% vs. 22%) and they represent the fewest living with children (26% vs. 34%)
- Ethnicity: Average Caucasian (80% vs. 81%); slightly more African-American (18% vs. 14%); more Hispanic (8% vs. 2%)
- Employment: Average level of full-time employees (59% vs. 61%) and retirees (16% vs. 16%)
- Residence: Fewer than a third of visitors live in-state (28% vs. 32%).

Trip Profile:

- Purpose: Fewer *visit friends/relatives* (29% vs. 35%), far more are lured by *entertainment* (26% vs. 17%)
- Length of stay: Most spend the night (71% vs. 69%), but for less time than average (2.5 vs. 3.1 nights); visitors choose paid accommodations just slightly more often than average (56% vs. 52%)
- Travel party: Average travel party size (43% vs. 44% solo; 38% vs. 37% pairs; 18% vs. 20% 3+)
- Mode: Drive their own car much more often than average (92% vs. 77%)
- Planning horizon: Quite spontaneous (52% vs. 43% decide to visit within 2 weeks of trip)
- Activity choices: Dominated by casino/gaming (44% vs. 15%)
- Spending: Second-most after New Orleans (\$848 vs. \$763); 19% on gaming and 41% on lodging
- Satisfaction with Louisiana: These visitors top the other five cities in satisfaction (93% vs. 87%).
- Note: the spending % on gaming drops by half while satisfaction climbs notably – perhaps better gaming results?

% of Louisiana Visitors
Who Went to Lake Charles

■ Lake Charles
■ Non-Lake Charles



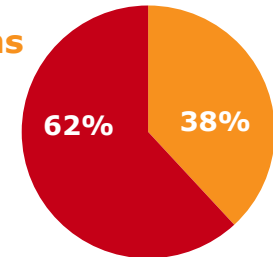
New Orleans visitor profile

Market relevance

Over a third (38%) of Louisiana visitors stops in New Orleans.
Comparisons below = (New Orleans vs. Total Louisiana visitors)

**% of Louisiana Visitors
Who Went to New Orleans**

■ New Orleans
■ Non-New Orleans



Demographic Profile:

- Age: Somewhat younger (41 vs. 45)
- Income: With Lafayette, highest among cities visited (\$77,700 vs. \$68,900)
- Married: Less often married (50% vs. 56%)
- Household composition: Very similar to average visitors, except slightly fewer live with children (31% vs. 34%)
- Ethnicity: Somewhat fewer Caucasians (74% vs. 81%) and more African-Americans (20% vs. 14%)
- Employment: Above average full-time employment (66% vs. 61%), fewer retirees (9% vs. 16%)
- Residence: A quarter of visitors live in-state (23% vs. 32%).

Trip Profile:

- Purpose: Relatively fewer *visit friends/relatives* (26% vs. 35%); more come for *entertainment* (26% vs. 17%) and *business* (21% vs. 16%)
- Length of stay: More likely to spend the night (81% vs. 69%) for longer stays (3.5 vs. 3.1 nights) and somewhat above average usage of hotels/motels for lodging (60% vs. 52%)
- Travel party: Often travel in pairs (33% vs. 37%); more visit alone (50% vs. 44%), consistent with more business travelers
- Mode: Drive their own car less often than average (61% vs. 77%); more often fly (28% vs. 11%)
- Planning horizon: Less spontaneous (30% vs. 43% decide to visit within 2 weeks of trip)
- Activity choices: New Orleans leads on urban activities, with these as the top four: urban sightseeing (33% vs. 15%), fine dining (32% vs. 16%), shopping (32% vs. 19%), historic sites/churches (29% vs. 13%); special events also draw visitors to New Orleans (14% vs. 5%)
- Spending: New Orleans visitors spend more than those to any of the other five destinations (\$1,210 vs. \$763)
- Satisfaction with Louisiana: Highly satisfied, placing above the Louisiana average (91% vs. 87%).



Shreveport visitor profile

Market relevance

About one Louisiana visitor in seven (15%) stops in Shreveport.
Comparisons below = (Shreveport vs. Total Louisiana visitors)

Demographic Profile:

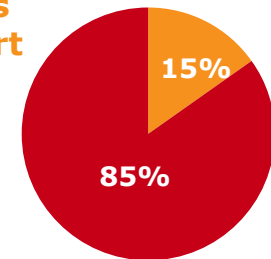
- Age: Similar age as other Louisiana visitors (44 vs. 45)
- Income: Somewhat less affluent (\$55,700 vs. \$68,900)
- Married: Average likelihood of being married (56% vs. 56%)
- Household composition: Most likely to live in two-person households (39% vs. 33%), but average likelihood to live with children (33% vs. 34%)
- Ethnicity: More Caucasians (85% vs. 81%) and average African-American (13% vs. 14%) heritage
- Employment: Average employed full-time (59% vs. 61%), near average retired (19% vs. 16%)
- Residence: A little more than a quarter of visitors live in-state (27% vs. 32%).

Trip Profile:

- Purpose: Fewest (of the cities) to *visit friends/relatives* (20% vs. 35%); they often cite *other pleasure*, and activities include *gaming* (32% vs. 15%) more often than any other destination except Lake Charles (44%)
- Length of stay: Often spending the night (66% vs. 69%); they counter their slightly shorter stay (2.8 vs. 3.1 nights) with greater use of hotels/motels for lodging (71% vs. 52%)
- Travel Party: Fewer visitors arrive in large (3+) groups (13% vs. 20%) while slightly more arrive alone (47% vs. 44%) or with one other (40% vs. 37%)
- Mode: Typically drive their own car – more often than the average Louisiana visitor (91% vs. 77%)
- Planning horizon: Very spontaneous (54% vs. 43% decide within 2 weeks of trip)
- Activity choices: Far more often come for *casinos/gaming* (32% vs. 15%) than any other activity, although Shreveport trails Lake Charles (44%)
- Spending: Shreveport visitors spend the third-most of the six destinations (\$7439 vs. \$763), 26% toward *gaming*
- Satisfaction with Louisiana: Although usually satisfied, these visitors place below average (77% vs. 87%).

% of Louisiana Visitors
Who Went to Shreveport

■ Shreveport
■ Non-Shreveport



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Appendix



Louisiana's Business Development Index – Top 50 BDI Calculations

- The Business Development Index, calculated for each DMA, measures the propensity of residents to take trips to Louisiana compared to that DMA's proportion of the total population. For example, Biloxi-Gulfport, MS residents represent 0.109% of all US residents, but 2.184% of total Louisiana visitors.
- Those proportions $2.184/0.109$ ($\times 100$) yield a BDI of 2003. The baseline (100) represents an equal proportion of US households as Louisiana visitors from that DMA.

Louisiana High BDI Index: Results by DMA

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Biloxi-Gulfport, MS	336,331	0.109%	341	2.184%	2003
St. Joseph, MO	126,837	0.041%	71	0.455%	1106
Beaumont-Port Arthur, TX	452,378	0.147%	229	1.466%	1000
Jackson, MS	920,118	0.298%	363	2.325%	780
Tyler-Longview (Lufkin & Nacogdoches), TX	727,345	0.236%	260	1.665%	706
Corpus Christi, TX	570,412	0.185%	162	1.037%	561
Hattiesburg-Laurel, MS	299,535	0.097%	75	0.480%	495
Houston, TX	6,333,391	2.052%	1465	9.381%	457
Gainesville, FL	328,414	0.106%	68	0.435%	409
Mobile-Pensacola (Ft. Walton Beach), AL-FL	1,411,410	0.457%	290	1.857%	406
Greenwood-Greenville, MS	200,018	0.065%	37	0.237%	366
Austin, TX	1,918,090	0.622%	330	2.113%	340
Little Rock-Pine Bluff, AR	1,450,904	0.470%	224	1.434%	305
Wichita Falls & Lawton, TX-OK	416,979	0.135%	61	0.391%	289
Tulsa, OK	1,381,611	0.448%	197	1.262%	282

Panel: State/Region residence of those who visited Louisiana (Household Level)



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Louisiana's Business Development Index – Top 50 *continued*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Meridian, MS	186,249	0.060%	26	0.166%	276
Dallas-Ft. Worth, TX	7,283,340	2.360%	908	5.815%	246
Columbus, GA	555,603	0.180%	57	0.365%	203
Dothan, AL	275,543	0.089%	24	0.154%	172
Springfield, MO	1,055,134	0.342%	82	0.525%	154
Sioux City, IA	409,020	0.133%	30	0.192%	145
Abilene-Sweetwater, TX	306,105	0.099%	22	0.141%	142
Augusta, GA	668,684	0.217%	48	0.307%	142
Knoxville, TN	1,346,560	0.436%	96	0.615%	141
Ft. Wayne, IN	718,030	0.233%	51	0.327%	140
Boise, ID	733,049	0.238%	48	0.307%	129
Odessa-Midland, TX	408,451	0.132%	26	0.166%	126
Springfield-Holyoke, MA	692,807	0.225%	40	0.256%	114
Nashville, TN	2,671,992	0.866%	146	0.935%	108
Norfolk-Portsmouth-Newport News, VA	1,927,724	0.625%	105	0.672%	108
Birmingham (Anniston and Tuscaloosa), AL	1,894,302	0.614%	103	0.660%	107
Waco-Temple-Bryan, TX	977,985	0.317%	53	0.339%	107
Atlanta, GA	6,530,223	2.116%	350	2.241%	106

Panel: State/Region residence of those who visited Louisiana (Household Level)



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Louisiana's Business Development Index – Top 50 *continue*

Louisiana High BDI Index *continued*

DMA of Origin	Total US Population	% of Population	Louisiana Visitors (Person-Trips)	% Visitors	High BDI Index
Bowling Green, KY	207,755	0.067%	11	0.070%	105
Ft. Smith-Fayetteville-Springdale-Rodgers, AR	815,585	0.264%	43	0.275%	104
Huntsville-Decatur (Florence), AL	1,004,862	0.326%	50	0.320%	98
Omaha, NE	1,085,615	0.352%	54	0.346%	98
Dayton, OH	1,311,730	0.425%	63	0.403%	95
San Antonio, TX	2,446,839	0.793%	105	0.672%	85
Columbus-Tupelo-West Point, MS	491,150	0.159%	20	0.128%	80
Monterey-Salinas, CA	732,478	0.237%	28	0.179%	76
Memphis, TN	1,844,840	0.598%	70	0.448%	75
Harlingen-Weslaco-Brownsville-McAllen, TX	1,258,141	0.408%	47	0.301%	74
Tucson (Sierra Vista), AZ	1,175,174	0.381%	43	0.275%	72
Indianapolis, IN	2,841,238	0.921%	98	0.628%	68
Jonesboro, AR	207,795	0.067%	7	0.045%	67
Columbia-Jefferson City, MO	457,357	0.148%	15	0.096%	65
Columbia, SC	1,050,517	0.340%	31	0.199%	58
La Crosse-Eau Claire, WI	556,456	0.180%	15	0.096%	53
Paducah-Cape Girardeau-Harrisburg, KY-MO-IL	976,726	0.317%	25	0.160%	51

Panel: State/Region residence of those who visited Louisiana (Household Level)



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Glossary

Term	Definition
Balance of Trade	Net Export-Import (Surplus = +; Deficit = -)
Import	Money departing the state (Louisiana residents vacationing elsewhere)
Export	Money entering the state (Non-Louisiana residents visiting Louisiana)
DMA	Designated Market Area: Counties that share the same primary TV broadcast signals (210 DMAs in US)
Calendar Year	January 1, 2011 through December 31, 2011
In-State	Louisiana
Person-Trip	Total person-trips are all trips taken by all people; i.e. a couple taking three trips counts as six (two people, each taking three trips)
High BDI Marketing Area	DMAs where residents have an above average propensity to visit Louisiana
Respondent/Household Level	Respondent information – one count per respondent
Source of Visitors	Residence of visitors
State/Region Level	Information about all trips taken to a particular state/region (each trip to area counts)
Travel Party	Traveler plus all companions, including children
Trip	Travel 50 miles or more (one-way) away from home or stayed overnight. Excludes commuters or commercial travel (flight attendants, commercial vehicle operator). This may eliminate some leisure day trips that are closer than 50 miles away.
Trip Level	Information about all trips – each trip counts
Trip Volume	All trips summed together
FutureView™	TNS' FutureView™ identifies five consumer categories. Of those, "Future Shapers" quickly adopt new products and influence others. They share seven traits: value authenticity/originality, well informed/involved, individualistic, time-poor, socially responsible, curious/open-minded/receptive to new ideas, and advocates of new ideas – they spread the word.
Visitor	Person who has visited Louisiana in the past month; all are US residents, thus, travel is domestic travel only (domestic consumer)



Research Methods

The syndicated TravelsAmerica study uses a web-based research methodology. Sample is selected from the TNS 6th dimension USA Panel with monthly e-mail invitations sent to representative households with a target response rate of 45%. The field period runs for two weeks each month, usually starting in the middle of the first week. TNS constantly strives to keep Internet penetration high and panel fatigue low by carefully monitoring and limiting the number of contacts with each household.

To enhance relevance, the data are weighted two ways:

- Demographic weights adjust respondents by demographic factors such as region, age, income, household size, and marital status to more closely represent the characteristics of the US population
- Trip projection calculations count every trip taken by respondents for total trips taken and in the case of state level calculations, each trip taken in that state counts. A few tables represent person-trips – these take into account the immediate household travel party size for each trip as well.

TNS supervises all fieldwork, editing, coding, and tabulation of the results.

This special report focuses on results for Louisiana. For the calendar year ending December 31, 2011, respondents for key segments in this report are shown below.

CY 2011 Number of Travelers (Unweighted Respondents)	CY 2011 Number of Travelers (Weighted by Demographics)	Region
503	608	Louisiana Residents
6,480	7,807	High BDI Marketing Area
37,882	43,763	Reside Elsewhere (not Louisiana, not High BDI Mktg Area)
44,865	52,177	Total for TravelsAmerica



Digital Life Coming to TravelsAmerica Soon!

Digital Life identifies opportunities to grow your business, through a precise understanding of digital human attitudes and behaviors such as how travellers interact with their mobile phones, pcs, tablets, and social networking platforms.



Digital Life will pinpoint the range of growth opportunities available to Louisiana in the online world



Addressing the key questions that inform strategic marketing investment

Users "I am online"

To reach the "Digital User":

- What's the reach, size, structure of the digital channel?
- Can I get my message to users in new markets?
- How do I communicate with my target group?

Consumers "I engage with brands online"

To engage with the "Digital Consumer":

- How are consumers interacting with brands online?
- Should I build friends and fans on social networks?
- What brand opinions are consumers forming through digital?

Advocates "I tell others online about brands"

To identify & cultivate the "Digital Advocate":

- What is the level and influence of buzz for my category?
- Who is talking about my category and who is listening?
- What's the impact of negative conversation online?

Customers "I use online prior to and for purchase"

To convert the "Digital Customer":

- What is the role of online and offline channels throughout the path-to-purchase, for researching and buying products?
- How can I encourage my customers to purchase online?